Netopia eCare 4.5 Administrator's Guide

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Contents

Chapter 1: Introduction

Welcome to eCare!

Netopia's eCare system allows Support Agents to interact with remote users, in real time, to efficiently identify and resolve technical-support and customer-service issues. As the eCare administrator, you will manage the eCare Service Center and enable your Support Agents to provide fast and efficient service for customers and fellow employees. Your Support Agents will be able to troubleshoot remote computers as if they were sitting right in front of them! Support Agents can use eCare's remote-access services to steer your customers and employees to the Web pages and information they need, send them files and applications, and even view or control their computers to help diagnose and resolve their problems.

How Can I Customize eCare?

Enabling and Disabling Features

eCare's feature-management system allows you to control whether or not certain services and features are available to your Support Agents and customers. The *Features* settings in the eCare Preferences Manager allow you to turn features on and off to control eCare functionality, adjust eCare behavior to fit your organization's security and privacy policies, and gather information from customers and Support Agents.

See "Features: Enabling and Disabling eCare Features" on page 36.

Customizing the Look and Feel

In addition to enabling and disabling specific features, you can completely customize and "brand" the look and feel of your eCare service to make it consistent with your corporate identity. The *Appearance* settings in the eCare Preferences

Manager allow you to change the color scheme of both the customer and Support Agent portals. You may also upload custom images to replace the default ones used by your eCare service.

See "Appearance: Customizing the Appearance of your eCare Service Center" on page 33.

Providing Multiple Tiers of Support

eCare allows you to assign different levels of privilege to different Support Agent profiles. By assigning different *roles* to different user profiles, you can create first-tier Support Agents that supply chat-only support and second-tier Support Agents with full remote-control and system-examination privileges. If the first-tier Support Agents cannot solve the customer's problem, they can *escalate* the issue to a second-tier Support Agent.

See "Creating User Profiles" on page 14.

Providing Multiple Access Portals

The primary eCare *portal*, or entry point, allows your customers to fill out and submit trouble tickets. They are then placed in the trouble-ticket queue, where Support Agents will select tickets to assist.

However, in addition to the standard entry method, eCare provides several other options that allow your customers may enter the trouble-ticket queue automatically, without entering a trouble ticket. They may respond to an email invitation submitted by a Support Agent, reconnect automatically after a reboot or session interruption, or use a unique Web link generated by an external customer-management system.

See "Signing In With eCare Portals" on page 10.

Gathering Information with Surveys

With eCare surveys, you can gather information from both your customers and your Support Agents. Customer-facing surveys provide the opportunity to collect demographic information about your customers themselves, as well as the problems they are encountering and their level of satisfaction with the support they receive. Support Agents can also provide information about customer issues, as

well as the problems that Support Agents themselves encounter during their workday.

See "Customizing eCare Surveys" on page 41.

View Reports

In the eCare Reporting Center, you can generate reports that summarize the activity on your eCare system and monitor the performance of specific Support Agents or your entire support team.

You can view reports

- For individual Support Agents
- For all Support Agents as a group
- For individual trouble tickets
- For individual customers

See "eCare Reporting Center."

Administering Your eCare Service Center

As an eCare administrator, you can

- Create, modify, and delete sign-in identities for yourself, your Support Agents, and other administrators
- Sign Support Agents and administrators out of the eCare system
- Start and shut down your eCare service
- Set hours of operation for the eCare Service Center and specify the behavior that occurs when it is closed
- Customize or "brand" the appearance and behavior of your eCare Service Center with custom files, templates, images, and messages
- Create custom URL and Chat shortcuts for use by your Support Agents
- Specify email addresses to be notified when a trouble ticket is submitted
- Modify trouble-ticket submission, alert, and display options
- Generate reports about the activity on your eCare Service Center

Note: Depending on your eCare installation, you may not have access to all administrator privileges.

System Requirements

Supported Browsers

eCare supports different Web browsers on Windows and Mac OS X computers.

- Windows—Microsoft Internet Explorer version 5.5–7.0
- Mac OS X—Safari version 1.3 or later

Supported Operating Systems

- Windows 98 Second Edition, Windows 2000, Windows ME, Windows XP, and Windows 2003
- Mac OS X version 10.3.9 or later

Chapter 2: Signing In and Getting Started

To sign in to the eCare system as an administrator, open your browser and enter the URL for the eCare Administrator portal. Enter your administrator user name and password to access the administration tools.

Signing In With eCare Portals

Different eCare users will sign in to eCare through different *portals*. The portals are customized for the different audiences that will use them.

The eCare Customer Portal

The primary eCare entry point, located at the top level of the eCare service, is intended for your customers to submit trouble tickets. Customers who require assistance will use the following URL to access your eCare Service Center.

http://‹*ecare-server*›/‹*service-name*›

You can either link to this URL or provide it to your customers for them to submit support tickets.

By default, the eCare customer portal requests the customer to fill out a trouble ticket with their contact information and a description of their problem. However, with the *Options* tab in the eCare Preferences Manager (see page 31), you may also set the trouble-ticket form to request only the customer's email address.

Other Connection Options for Customers

In addition to the basic customer portal, there are several other portals through which your customers may enter the trouble-ticket queue automatically, without entering a trouble ticket.

- The *Email Invite service* uses the Email Invite portal. This service allows your customers to enter the trouble-ticket queue by responding to an email invitation submitted by a Support Agent.
- The *Reboot Computer service* uses the Reconnect portal. This service allows the Support Agent to reboot the customer's computer. When the computer restarts, it automatically reconnects to eCare.
- The *Connect to eCare link* also uses the Reconnect portal. The link may be saved to the customer's desktop when the eCare session is established. If the eCare session is interrupted, the customer may return to eCare by double-clicking the link.
- The optional *TicketConnector portal* allows you to integrate the trouble-ticket queue with an external customer-management system. The remote system can generate a unique Web link, which the customer clicks to enter the queue.

The Email Invite and Reconnect portals are installed by default with your eCare service. You may disable these portals with the eCare Preferences Manager, under the *Automated Connection/Reconnection* heading on the *Features* tab (see page 36).

The TicketConnector portal requires special configuration of the eCare server.

The eCare Support Agent Portal

Your Support Agents will use their own portal to access the eCare trouble-ticket queue. Their portal is located at

http://‹*ecare-server*›/‹*service-name*›/agent

Support Agents must sign in before they can access the trouble-ticket queue and begin assisting customers.

Note: Your eCare administrator credentials allow you to sign in to both the Support Agent and Administrator portals.

The eCare Administrator Portal

The eCare Administrator portal provides access for eCare administrators to manage the eCare Service Center and the associated Support Agents. This portal is located at

http://‹*ecare-server*›/‹*service-name*›/admin

Administrators must sign in before they can manage the eCare Service Center.

Note: By default, the Administrator portal is always open. Its service hours cannot be changed through the eCare user interface. This is to ensure that eCare administrators are not accidentally “locked out” of the eCare system.

Changing Your Administrator Password

You cannot change your own password through the Administrator portal. To change your administrator password, you must sign in to eCare through the Support Agent portal. (Your eCare administrator credentials allow you to sign in to both the Support Agent and Administrator portals.)

Once you have signed in to the Support Agent portal, click the *Change Password* button. In the Change Password window, enter and confirm your new password. Then click *Submit*. Your password is changed immediately.

Chapter 3: Setting Up Support Agents and Schedules

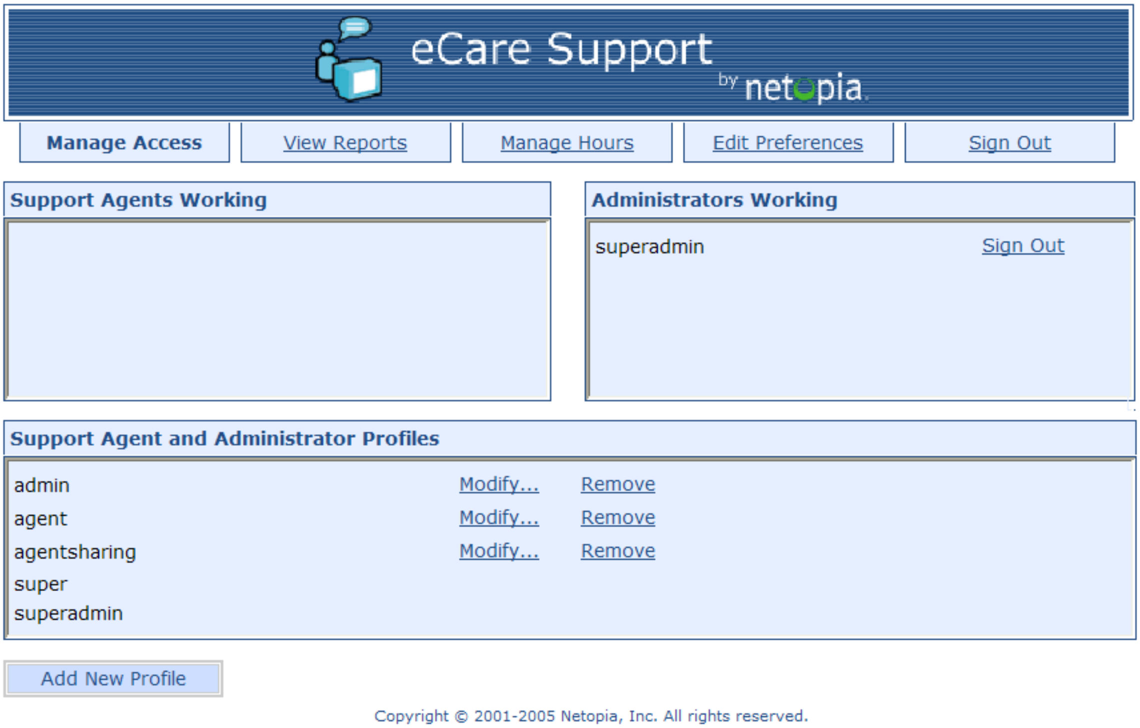
When you first sign in to the eCare Administrator portal, the Manage Access page appears. You will use the Manage Access page to create, modify, and delete eCare user profiles.

From the Manage Access page, you may also open additional pages to manage your eCare Service Center:

- Click *View Reports* to enter the eCare Support Reporting Center, in which you can generate reports that summarize the activity on your eCare Service Center and monitor the performance of your entire support team. eCare Reporting is discussed in “eCare Reporting Center” on page 56.
- Click *Manage Hours* to manage the operating schedule for your eCare Service Center. See “Managing the eCare Service Center Operations Schedule” on page 19.
- Click *Edit Preferences* to customize the appearance of your eCare Service Center, enable and disable eCare features, and upload custom files. See chapter 4, “Managing Settings with the eCare Preferences Manager.”
- Click *Sign Out* to sign out of the eCare Administrator portal.

Managing Support Agents and Administrators

The Manage Access page displays the Support Agents and administrators that are currently signed in to your eCare system. With the Manage Access page, you can manage Support Agent and administrator profiles. You can also sign active administrators and Support Agents out of the eCare system.



Creating User Profiles

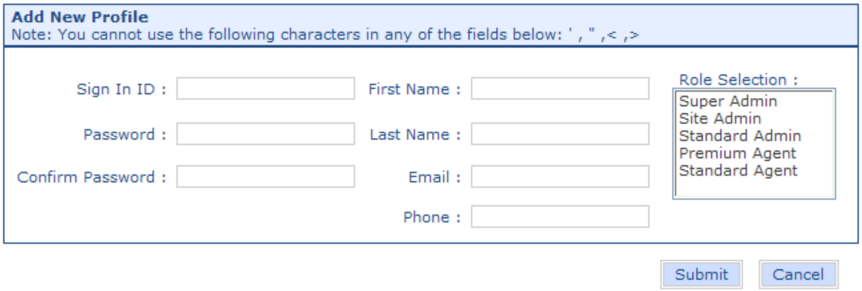
Every Support Agent and administrator identity in your eCare system requires its own *user profile*. The user profile specifies the user name and password for signing in to eCare and the access privileges associated with that set of access credentials. The user profile may also include contact information.

The same process is used to create Support Agent and administrator profiles. The user role you select when you create the profile will determine whether the new user has administrator privileges.

To create a new Support Agent or administrator user profile

1. On the Manage Access page, click the *Add New Profile* button.

   The Add New Profile page appears.



2. On the Add New Profile page, enter a user ID for the Support Agent in the *Sign In ID* field. Then enter a password in the *Password* and *Confirm Password* fields.

   You cannot create the new user profile until the *Password* and *Confirm Password* boxes match exactly. The password must be at least 5 characters in length. (The maximum length is 200 characters.) It may include numbers and letters, both lower case and upper case.

3. Enter the Support Agent's first and last names in the *First Name* and *Last Name* fields.

   The *Name* fields are not required. However, these fields are used in session-transcript logging, making it easier for you to identify the associated Support Agent. If you do not enter a name, eCare will display the phrase "Unidentified Agent" to the customer during the eCare session.

   Note: To protect the Support Agent's privacy, only the first name is displayed to the customer during eCare sessions. (If you wish to display the Support Agent's full name, use the *Show Admin's Full Name* option on the *Options* tab in the eCare Preferences Manager. See page 31.)

4. Enter the Support Agent's email address in the *Email* field.

   The *Email* field is not required. However, if it is not present, the Support Agent will not be able to use the Email Transcript feature.

5. In the *Role Selection* list, select a user role. (See the following section, "Setting the User Profile's Role Assignment," for details about assigning the role. The roles that appear in the *Role Selection* list may vary depending on your level of access privileges.)

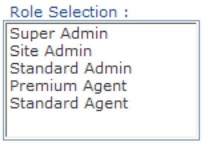
   The role assignment is required. It controls the eCare privileges that will be available to the new user.

6. When you are finished creating the new user profile, click *Submit*.

Setting the User Profile's Role Assignment

The *role* you assign to the new user profile determines the eCare privileges that will be available to the Support Agent or administrator using that profile. These privileges are summarized in the *Roles* table at the bottom of the page. For example, note that Standard Agents cannot use eCare's remote-control features; these features are reserved for Premium Agents.

To assign a role to the new Support Agent or administrator, select the role in the *Role Selection* list. (Refer to the section at the bottom of the page for a list of the privileges associated with each role.)



Note: The roles you may assign will vary depending on your own level of access privileges. Your eCare service may also include custom roles. If you are unable to assign the role you need, contact your site administrator or eCare Service Provider.

The role assignment is required. You cannot create the new user profile until you have assigned a role.

When you are finished creating the new user profile, click *Submit*.

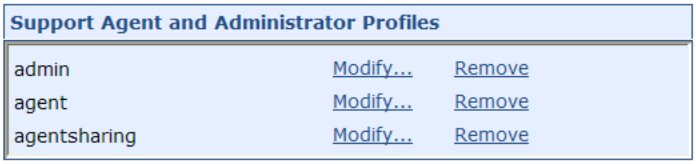
Modifying User Profiles

The Modify Profile page allows you to update a selected user profile's password, role assignment, and other information.

You cannot change the user profile's Sign In ID on the Modify Profile page. To change the Sign In ID, you must create a new user profile.

To modify a Support Agent or administrator user profile

1. On the Manage Access page, click *Modify* next to any user name to update that user profile. You may update your own profile.



The Modify Profile page appears.

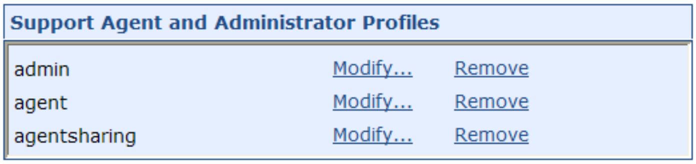
2. Edit the user profile as needed. See the procedure under "Creating User Profiles" on page 14 for information about the available fields.

   Note that you do *not* need to know the user profile's current password in order to change it. If the user of the profile has forgotten the password, you can reset it here.

3. When you have finished making your changes, click *Submit*.

Removing User Profiles

To remove an existing user profile from the eCare system, click *Remove* next to any user name in the *Support Agent and Administrator Profiles* area. Confirm the removal to delete the user profile.



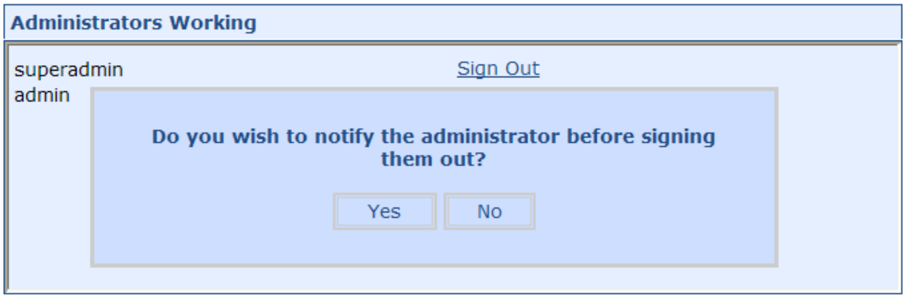
Note that a Support Agent or administrator who is signed in to the eCare Service Center is *not* automatically signed out when you delete the associated user profile. The active user will retain the same eCare access privileges until they sign out. However, it is recommended that you avoid deleting a Support Agent who is currently assisting a customer, as it may affect the functionality of the active eCare session.

If you wish to immediately deny eCare access to a certain user profile, you must sign out the active user before you delete the user profile.

To sign an active user out of your eCare Service Center without deleting the user profile, see the following section, "Signing Out Support Agents and Administrators."

Signing Out Support Agents and Administrators

The *Support Agents Working* and *Administrators Working* areas display the Support Agents and administrators currently signed in to your eCare system. You can sign a Support Agent or administrator out of the eCare system by clicking *Sign Out* next to the user's name. A window appears, allowing you to indicate whether or not to notify the user who is about to be signed out. Choose *Yes* or *No* to complete the sign-out process.

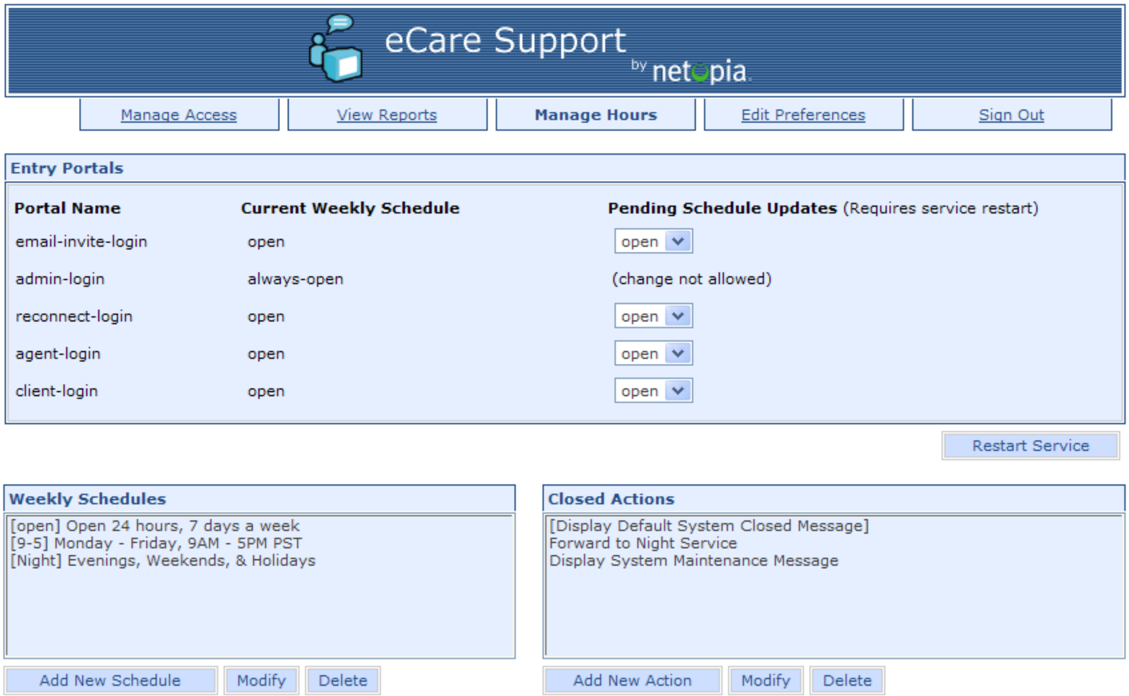


When you sign out a Support Agent, it frees a seat in your eCare Service Center for another Support Agent to sign in.

Note: If you sign out a Support Agent who is actively helping a customer, the customer's trouble ticket will be escalated automatically. If you sign out an administrator who is actively making changes, their work will *not* be saved automatically. Netopia recommends that you choose the *Yes* option in the sign-out window, which notifies the administrator and allows them time to save their changes.

Managing the eCare Service Center Operations Schedule

To create and modify the operating schedule for your eCare Service Center, click *Manage Hours* in the menu bar at the top of the main eCare Administrator window.



You can associate a different operating schedule with each eCare portal. The default eCare configuration file sets all portals to be open at all times.

Note: By default, the **admin-login** portal is set to *always-open*. Its service hours cannot be changed through the eCare user interface. This is to ensure that eCare administrators are not accidentally “locked out” of the eCare system.

Using Weekly Schedules

The default eCare installation includes one schedule, **open**, which is by default configured to be open at all times. The **open** schedule is assigned to all eCare portals (except **admin-login**, which is set to *always-open*).

Using Closed Actions

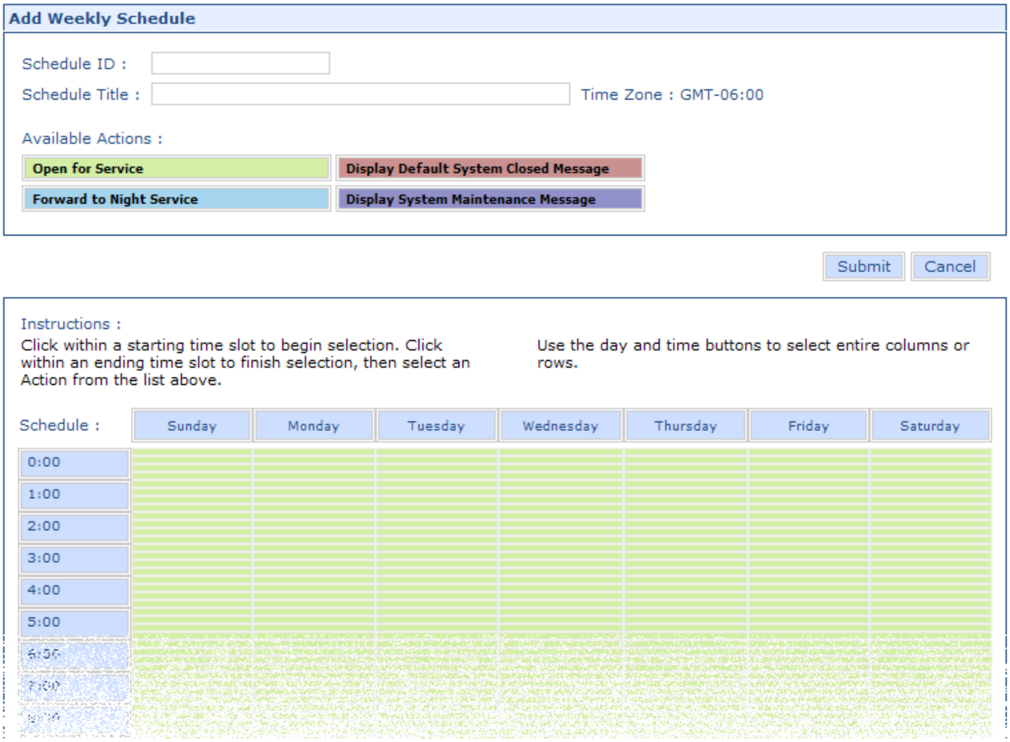
When you set up a weekly schedule, you will specify its *Closed Action*. The Closed Action specifies the behavior that occurs when customers visit your eCare Service Center while it is closed. For example, the eCare system may display a message indicating your hours of service, or it may forward the customer to a Web site with FAQs and troubleshooting tips.

By default, the only Closed Action is to display the message “We are closed. Please try again later.” If you wish to use a different Closed Action, create it *before* you create or modify your schedule. See “Setting Up Closed Actions” on page 23.

Adding a New Schedule

To change the schedule for any portal, you may modify the existing **open** schedule. However, it is recommended that you add a new one.

You can create multiple schedules for your eCare Service Center to handle holidays, vacations, or seasonal schedule changes. To create a new operating schedule for your eCare Service Center, be sure you have created the desired Closed Action (see “Setting Up Closed Actions” on page 23). Then click the *Add New Schedule* button. The Add Weekly Schedule window opens.



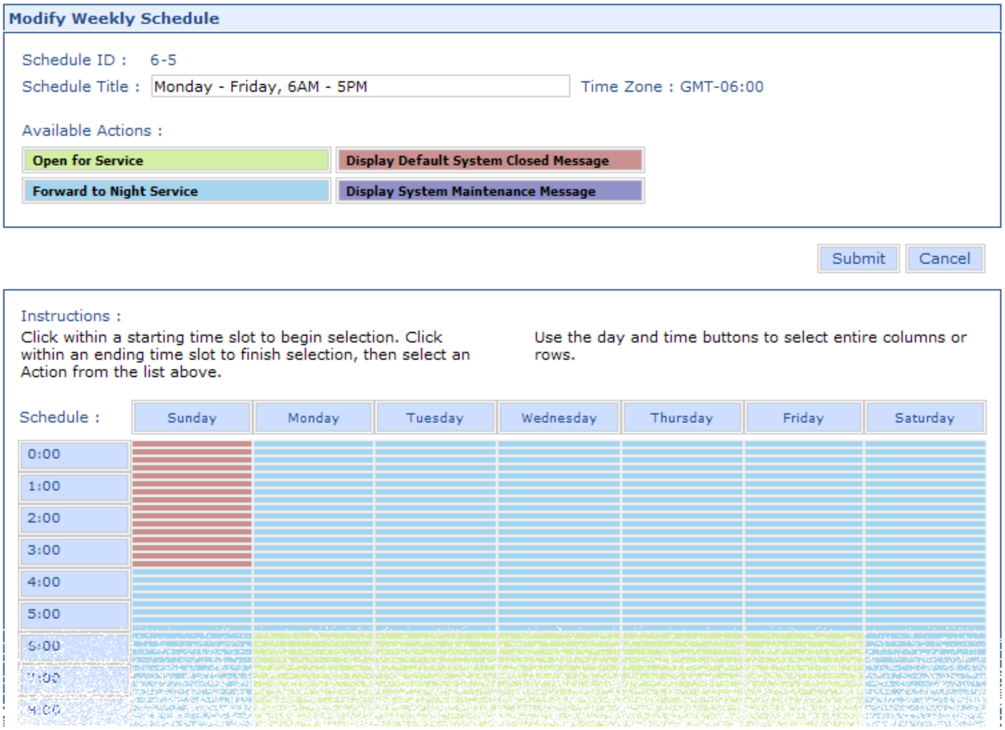
In the Add Weekly Schedule window, select a time block in the *Schedule* area. Click once at the beginning of the block, then click again end of the block. (Do not hold the mouse button down as you move the mouse.) Then click an *Available Action* to apply the action to the time block. Repeat this process to assign an action to each desired time block. When you are finished, click *Submit*.

Note: All hours in the eCare Administrator portal are in U.S. Central Standard Time.

The *Available Actions* always include the default open and closed options. Multiple "closed" options may be created, allowing you to control the behavior that occurs when customers visit your eCare Service Center while it is closed. For details, see "Setting Up Closed Actions" on page 23.

Modifying a Schedule

To modify an existing operating schedule for your eCare Service Center, select the schedule you wish to modify and click the *Modify* button. The Modify Weekly Schedule window opens.



To modify the schedule, make your changes as described in “Adding a New Schedule” on page 20. When you are finished, click *Submit*.

Note: You cannot change the Schedule ID on the Modify Weekly Schedule page. To change the Schedule ID, you must create a new operating schedule.

Deleting a Schedule

To delete a weekly schedule, select it in the *Weekly Schedules* area. Then click *Delete*. In the confirmation dialog box, click *Yes* to confirm the deletion.

Be careful not to delete any schedule that is currently assigned to any portal. If you delete a portal's assigned schedule, the portal will be locked out.

Setting Up Closed Actions

The *Closed Actions* area on the Manage Access page allows you to control the behavior that occurs when customers visit your eCare Service Center while it is closed. By default, a message appears to inform your customers that the eCare Service Center is currently closed.

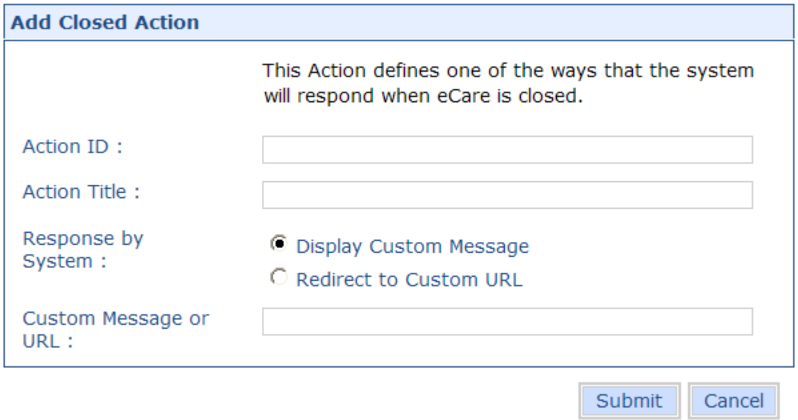
When you customize your closed action, you have two options in addition to the default text message.

- You may display a custom message. For example, the message may indicate that the Service Center is closed and specify its hours of operation.
- You may forward the customer to another URL. For example, the customer could be forwarded to a Web site with self-help resources such as FAQs and troubleshooting tips.

Note: When a portal closes, it does not affect customers and Support Agents that are already working. It affects only new ticket submissions and Support Agent sign-ins.

Adding a Closed Action

To create a new Closed Action for your eCare Service Center, click the *Add New Action* button. The Add Closed Action window opens.



To create a new Closed Action

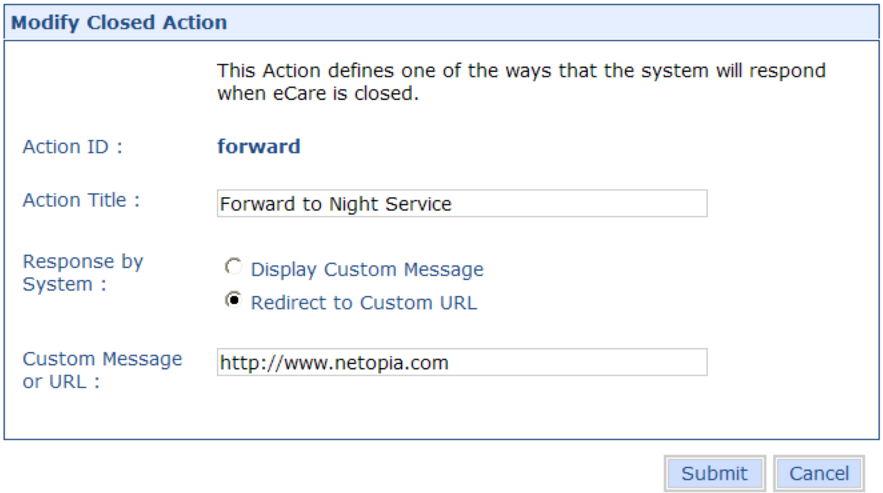
1. In the Add Closed Action window, enter a brief Action ID in the *Action ID* text box. The Action ID is the name used by the eCare system to identify the Closed Action.
2. Enter an Action Title in the *Action Title* text box. The Action Title is a descriptive title that will enable you to recognize the effect of the Closed Action.
3. Select a *Response by System* option.
   - *Display Custom Message* specifies that a message will be displayed on the eCare Service Center's main page, such as an indication that the Service Center is closed.
   - *Redirect to Custom URL* specifies that the customer is forwarded to a new URL, such as a different eCare Service Center.
4. Specify a message or URL in the *Custom Message or URL* text box.

   If you specify a message, it cannot be more than 255 characters. If you need a longer message, create a custom Web page with your message and specify its URL instead.

   If you specify a URL, be sure to enter the full URL, including *http://* or *https://*.
5. Click *Submit* to create the new Closed Action.

Modifying a Closed Action

To modify an existing Closed Action for your eCare Service Center, select the Closed Action you wish to modify and click the *Modify* button. The Modify Closed Action window opens.



To modify the Closed Action, make your changes as described in "Adding a Closed Action" on page 23. When you are finished, click *Submit*.

Note: You cannot change the Action ID on the Modify Closed Action page. To change the Action ID, you must create a new closed action.

Deleting a Closed Action

To delete a closed action, select it in the *Closed Action* area. Then click *Delete*. In the confirmation dialog box, click *Yes* to confirm the deletion.

Assigning a Schedule to a Portal

To assign a new schedule to a portal, open the *Pending Schedule Updates* drop-down list for the desired portal. Each available schedule appears in the list. Select the desired schedule for each portal you wish to change.

Note that, by default, the **admin-login** portal is set to *always-open*. Its service hours cannot be changed through the eCare user interface. This is to ensure that eCare administrators are not accidentally “locked out” of the eCare system.

Note: Schedule changes do not take effect until you restart your eCare service. For more information about restarting your eCare service, see “Restarting Your eCare Service” on page 51.

Chapter 4: Managing Settings with the eCare Preferences Manager

To customize the appearance and behavior of your eCare Service Center, click *Edit Preferences* in the menu bar at the top of the main eCare Administrator window.

The eCare Preferences Manager lets you brand the appearance and customize the functionality of your eCare Service Center. With the Preferences Manager you can

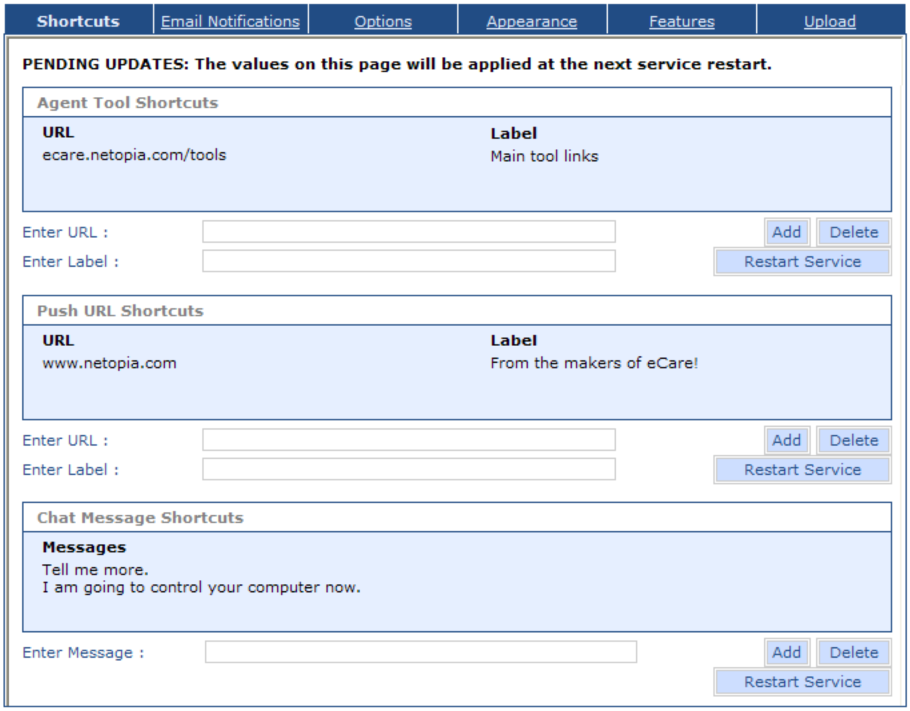
- Use the *Shortcuts* tab to add customized URL and Chat shortcuts for use by your Support Agents. See page 28.
- Use the *Email Notifications* tab to specify one or more email addresses to be notified when a trouble ticket is submitted. See page 30.
- Use the *Options* tab to manage trouble-ticket and other options. See page 31.
- Use the *Appearance* tab to customize and brand the appearance of your eCare Service Center. See page 33.
- Use the *Features* tab to control whether or not certain services and features are available to your Support Agents and customers. See page 36.
- Use the *Upload* tab to upload custom versions of certain eCare support files, such as style sheets and surveys. See page 38.

Note: Only one eCare administrator may use the eCare Preferences Manager at one time. If a second administrator clicks *Edit Preferences* while you are working,

eCare displays the message “Someone else is currently editing the site preferences. Please try again when they have finished.”

Shortcuts: Adding URL and Chat Shortcuts

With the *Shortcuts* tab, you can save frequently-used URLs and Chat statements so that Support Agents do not have to type them each time.



- *Agent Tool Shortcuts* are the Web sites that your Support Agents frequently access. These shortcuts provide a quick and easy way for your Support Agents to load company Web resources, such as corporate intranet pages, product knowledge base information, or bug databases.

  For example, if your customers frequently discover new bugs, an Agent Tool Shortcut to your bug database would allow the Support Agent to quickly enter the new bug or update a bug that has already been reported.

- *Push URL Shortcuts* are Web sites that your Support Agents frequently send to customers, such as FAQs or patch downloads. These shortcuts allow the Support Agent to push the Web sites directly to the customer's Web browser.

  For example, your technical support organization may maintain a Web page with links to downloadable files that the customer may need. Your Support Agent can push this URL to the customer's computer, and then use the Control Remote User service to download the necessary files.

  Or you may push a Web page that includes detailed instructions for a procedure the customer can perform. The Support Agent can follow along as the customer works, assisting as necessary.

- *Chat Message Shortcuts* are Chat statements that Support Agents may use frequently in their conversations with customers. Saving these text strings adds them to a shortcut menu, from which your Support Agents can select them instead of constantly retyping them.

  For example, you could create an explanation of what will occur when the Support Agent uses the Control Remote User service to access the customer's computer, or an explanation of the Email Transcript feature. Or save a set of instructions that may be useful to the customer after the eCare session. After the Support Agent uses the Chat statement with those instructions, it will appear in the session transcript.

To add an Agent Tool or Push URL Shortcut

1. On the eCare Preferences Manager menu bar, click *Shortcuts*.
2. In the appropriate section, enter the URL that you want to save in the *Enter URL* text box.
3. In the *Enter Label* text box, enter a short description to identify the URL.
4. Click *Add* to save the URL shortcut.

To add a Chat Message Shortcut

- Enter the Chat message in the *Enter Message* text box and click *Add*.

Chat Message Shortcuts are limited to one line.

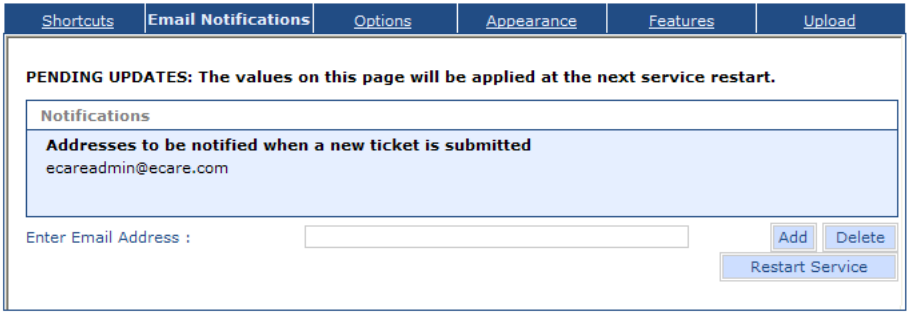
To remove an existing Agent Tool, Push URL, or Chat Message Shortcut

- Select the URL or message and click *Delete*.

Note: New URLs and chat shortcuts will not appear in the Support Agent interface until you restart your eCare service. Similarly, deleted URLs and chat messages will not be removed until you restart. For more information about restarting your eCare service, see "Restarting Your eCare Service" on page 51.

Email Notifications: Configuring Email Notification

When you enable the email notification feature, eCare sends an email to one or more email addresses every time a new trouble ticket is submitted. This frees your Support Agents from constantly monitoring the eCare ticket queue or allows managers to monitor the queue without signing in to eCare.



To specify an email address for notification

1. On the eCare Preferences Manager menu bar, click *Email Notifications*.
2. In the *Enter Email Address* text box, enter the email address to which notification will be sent.

   To streamline personnel changes, you may wish to use a group account or alias for email notification.
3. Click *Add* to save the email address.

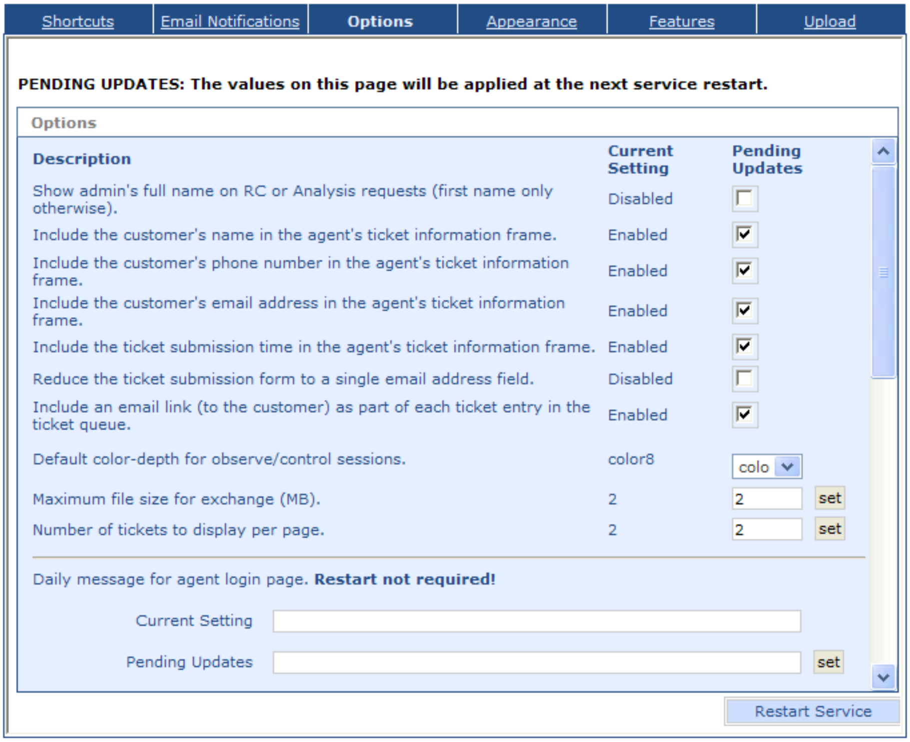
To remove an existing email address, select it and click *Delete*.

Note: Email notification address changes do not take effect until you restart your eCare service. For more information about restarting your eCare service, see "Restarting Your eCare Service" on page 51.

Options: Setting eCare Options and Messages

The *Options* settings in the eCare Preferences Manager allow you to control the customer information displayed in the Support Agent's eCare session window, as well as certain settings for the trouble-ticket queue and eCare session window itself.

You may also specify messages to appear on the Support Agent and administrator sign-in pages and the trouble-ticket submission page. And you may specify the email addresses associated with the sending and receiving of eCare surveys.



Note: The settings you can change may vary depending on your eCare installation.

Setting Trouble-Ticket Options

You can choose to enable or disable the inclusion of several different information items in the trouble ticket. If you do not wish to gather detailed customer information, you may also reduce the trouble-ticket submission form to a single email address field.

To enable a customer information item for display in the Support Agent's eCare session window, select the check box next to it. (If it is already selected, leave the check box in place.) To disable an option, clear the check box (or leave it empty if it is already clear). Use the drop-down list and text boxes to set the color depth and ticket display options.

Note: Changes to the trouble-ticket and session options and survey email addresses do not take effect until you restart your eCare service. (You do not need to restart your eCare service to change the daily message.) For more information about restarting your eCare service, see "Restarting Your eCare Service" on page 51.

Setting eCare Session Options

The *Show Admin's Full Name* option allows you to display the Support Agent's full name to the customer during the eCare session. By default, to protect the Support Agent's privacy, only the first name is displayed. To display the full name, select the check box next to the *Show Admin's Full Name* option (if it is already selected, leave the check box in place).

The *Default Color Depth*... option controls a setting for active eCare sessions. (Support Agents may also change the color depth during a session.) Use the drop-down list to specify the default color depth.

Note: Changes to the trouble-ticket and session options and survey email addresses do not take effect until you restart your eCare service. (You do not need to restart your eCare service to change the daily message.) For more information about restarting your eCare service, see "Restarting Your eCare Service" on page 51.

Specifying Messages

To specify a message that will appear on the sign-in page for Support Agents or administrators, or on the trouble-ticket submission page for customers, specify

the message in the appropriate box and click *Set*. You may use HTML tags such as <b> and <i> to format the message.

You may wish to use messages to inform Support Agents and customers of unusual situations such as new product releases or temporary service outages. For example, if a Web service that requires database access is down because of a hardware failure, you can post a message on the ticket-submission page. This may reduce the number of queries from customers who are unable to access the database.

You do not need to restart your eCare service after you change the message.

Specifying Survey Email Addresses

When a customer or Support Agent submits an eCare survey, eCare sends it to the email address you specify on the *Options* tab. The “From” address attached to the email is also set here.

Enter the desired email addresses in the *Default Address From Which*... and *Default Address To Which*... fields.

Note: Changes to the trouble-ticket and session options and survey email addresses do not take effect until you restart your eCare service. (You do not need to restart your eCare service to change the daily message.) For more information about restarting your eCare service, see “Restarting Your eCare Service” on page 51.

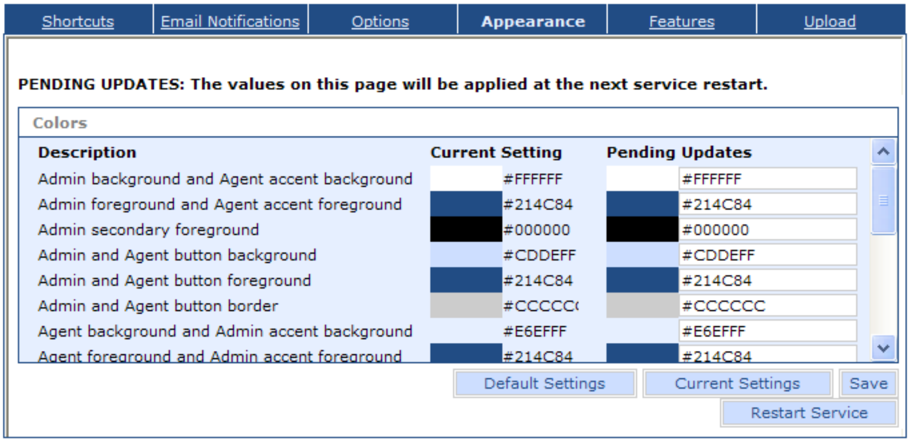
Appearance: Customizing the Appearance of your eCare Service Center

You can completely customize and “brand” the look and feel of your eCare service to make it consistent with your corporate identity. The *Appearance* settings in the eCare Preferences Manager allow you to change the color scheme of both the customer and Support Agent portals. You may also upload custom images to replace the default ones used by your eCare service.

Setting Custom Colors

The *Colors* area on the *Appearance* page allows you to specify the color of a number of eCare elements.

See "eCare Color Mapping" for detailed information about each eCare element and where it is used.



To change the default color scheme

1. In text box associated with the eCare element you wish to customize, enter a six-digit hexadecimal color code.

   When you click the next element you wish to customize, the element you just changed will display the color you specified.

2. Repeat step 1 for the remaining elements you wish to customize.

3. If you decide not to change the color for a particular element, delete its new color code and enter the code from the *Current Setting* column.

   To cancel all of your changes, click the *Current Settings* button.

   To revert your entire eCare Service Center to the default color scheme, click *Default Settings*.

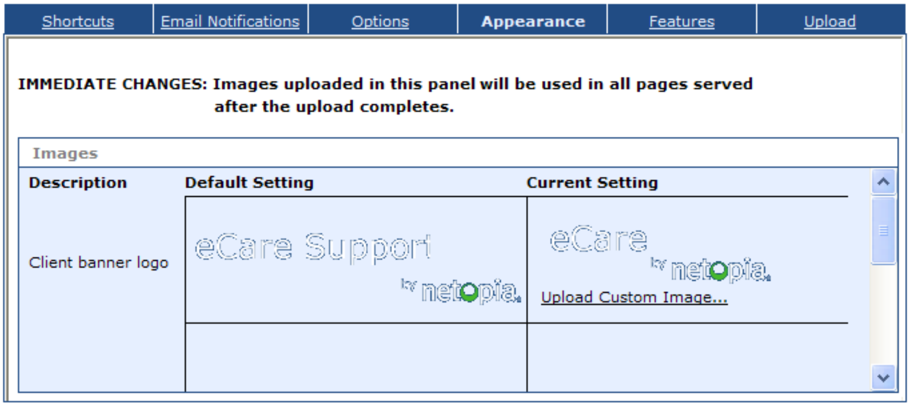
4. When you are finished, click *Save*.

Note: Changes to the color settings do not take effect until you restart your eCare service. For more information about restarting your eCare service, see "Restarting Your eCare Service" on page 51.

You may also use the *custom.css* file to manage the appearance of elements that may not appear on the *Appearance* tab. The *custom.css* file overrides the *Appearance* settings. See "Customizing Style Sheets" on page 49 for details.

Using Custom Images

You can upload custom images to eCare to replace the default eCare graphics and logos with those for your company or organization.



To upload a custom image

1. In the *Images* area on the *Appearance* page, locate the image that you wish to replace. Click the *Upload Custom Image* link in the *Current Setting* column.

   If the image you are replacing is already a custom image, the *Upload Replacement Image* and *Use Default* links will appear instead of the *Upload Custom Image* link.

   - Click *Upload Replacement Image* to upload a new custom image.
   - Click *Use Default* to revert a custom image to the default eCare image.

2. The *Browse* field appears beneath the *Images* area. Click the *Browse* button and select the file you want to upload.
3. Click the *Send File* button when you are ready to upload the file.

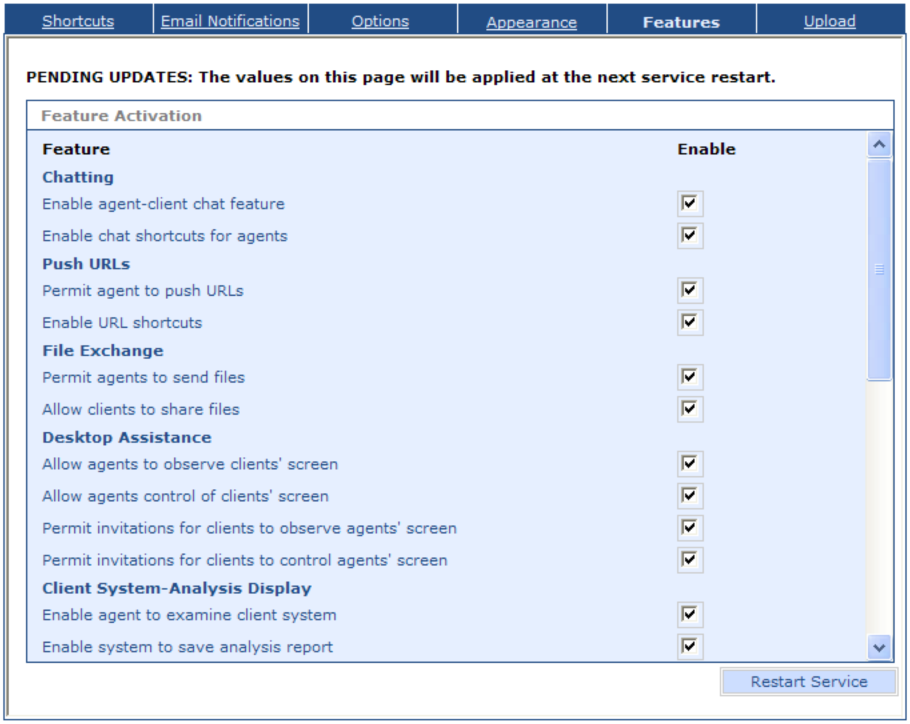
When you change images, they take effect immediately. You do not need to restart your eCare service. (You may need to clear your browser cache to force the new image to appear.)

Features: Enabling and Disabling eCare Features

In addition to customizing the look and feel of your eCare service, you may also control whether or not certain services and features are available to your Support Agents and customers. The *Features* settings in the eCare Preferences Manager allow you to turn features on and off to control eCare functionality, adjust eCare behavior to fit your organization's security and privacy policies, and gather information from customers and Support Agents.

Among other features, you can

- Enable or disable all remote-control services: allow Support Agents to view or control remote computers, or both; allow customers to view or control the Support Agent's computer, or both
- Enable or disable all file-sharing services: allow your Support Agents to send files to customers, receive files from customers, or both
- Enable or disable the Examine System feature, which allows the Support Agent to generate a system profile of the customer's computer; you may also control whether or not the Examine System report is automatically saved as part of the associated session transcript
- Enable or disable the Email Invite and Reconnect features, which allow the customer to bypass the trouble-ticket form and enter the queue directly—either by responding to an invitation from the Support Agent, or by reconnecting to eCare after a reboot or session interruption
- Specify when Support Agents and customers are presented with surveys



Note: The features you can enable and disable may vary depending on your eCare installation.

To enable and disable eCare features

1. On the eCare Preferences Manager menu bar, click *Features*.
2. By default, all eCare features are enabled. To disable a feature, clear the check box in the *Enable* column.

Note: Feature changes do not take effect until you restart your eCare service. For more information about restarting your eCare service, see “Restarting Your eCare Service” on page 51.

Disabling the Save Analysis Report Option

By default, the eCare system saves data generated by the Examine System service to the session archive. The Support Agent does not specify whether to save the results; the examination results are saved automatically. Because the data is not simply exported, and is saved as part of the ticket archive, it remains in the file system until it is stored or removed. (The associated index record, which indicates that the file was created, remains in the database permanently.)

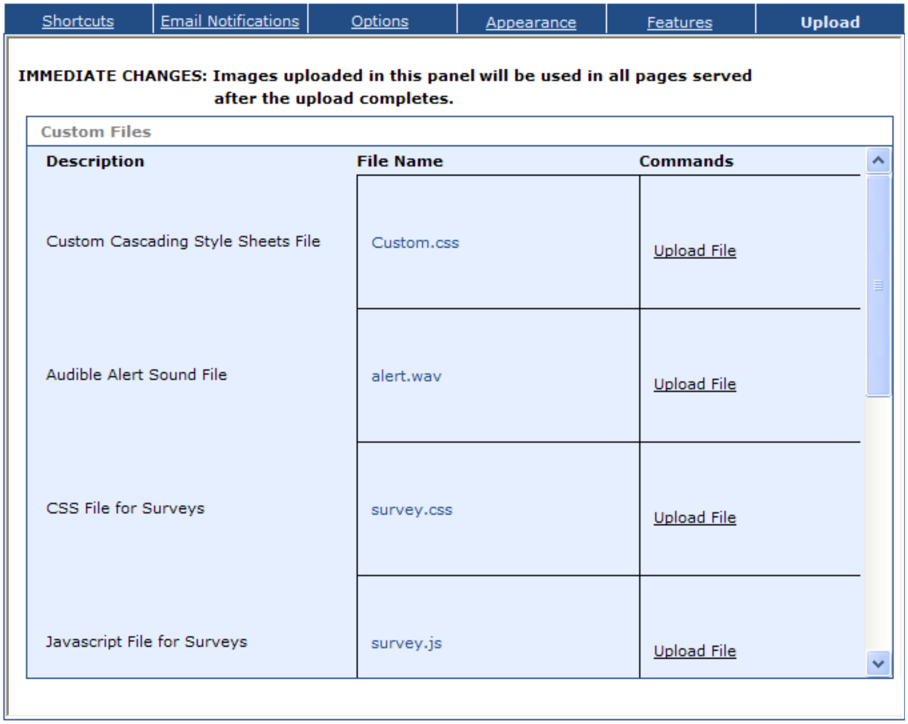
The average report is approximately 1MB in size. Be sure that your system has adequate storage capacity.

If you do not wish to save Examine System reports, clear the *Enable System to Save Analysis Report* option.

Upload: Uploading Custom Files

Another way to customize your eCare service is with custom files, which you can upload from the *Upload* tab in the eCare Preferences Manager. With the *Upload* tab, you can apply custom style sheets and sounds, and you can add custom surveys for your customers and Support Agents.

For more information about using custom files and configuring them to meet your needs, see chapter 5, “Using Custom Files.”



Note: The files you can upload may vary depending on your eCare installation.

To upload a custom file

1. On the eCare Preferences Manager menu bar, click *Upload*.
2. Click the *Upload* link next to the file you wish to replace.
3. The *Browse* field appears beneath the *Custom Files* area. Click the *Browse* button and select the file you want to upload.

   You do not need to rename the file before you select it. When you upload the file, it is automatically renamed to match the default file name that eCare uses. (For example, if you upload a new file called "*ping.wav*" to replace the existing Audible Alert Sound File, the new file will be renamed "*alert.wav*.")
4. Click the *Send File* button when you are ready to upload the file.

When you upload custom files, most take effect immediately. Unless you uploaded a new email template, you do not need to restart your eCare service.

New email templates are not used until you restart your eCare service. For more information about restarting your eCare service, see “Restarting Your eCare Service” on page 51.

Restoring Default Files

If for any reason you wish to restore the default version of any file, and you do not have the original files saved, you may download a ZIP archive of all default files from

> http://‹*ecare-server*›/‹*service-name*›/ecare4/templates.zip

Extract the desired file and upload it normally. For details, see chapter 5, “Using Custom Files.”

Chapter 5: Using Custom Files

eCare supports extensive customization options, including the ability to create and upload custom files. You can modify eCare surveys, style sheets, and the Email Invite email template. Once you have modified the desired files, you can upload them directly from the Upload tab in the eCare Preferences Manager. With the exception of the email template, uploaded files are effective immediately. You do not need to restart the eCare server to enable them.

Before You Modify Files

If you wish to modify any eCare files, be sure you know what you are doing. HTML, CSS, and JavaScript skills are recommended.

If you are modifying files for the first time, download them in a package from

http://‹ecare-server›/‹service-name›/ecare4/templates.zip

If you are already using custom files, be sure to back them up before you start making changes.

Customizing eCare Surveys

eCare's survey feature lets you monitor customer service levels and find out how your Support Agents are using eCare. As an eCare administrator, you have direct, immediate control over many aspects of surveys:

- Which surveys are offered, and when
- The number of questions
- The content of each question and the response options
- The appearance of the survey, through either the parent eCare style sheet or a special survey-only style sheet
- Where the results are sent

The survey results can even include dynamic content, such as trouble-ticket information or the Support Agent's name, by referencing JavaScript objects that are pre-populated by the eCare server.

Once you have configured the survey components to meet your needs, you can upload them directly from the eCare Administrator portal to the eCare server.

Survey Types

eCare supports both client and agent surveys. Surveys can be enabled and disabled individually. There are five different times when a survey may be presented.

- The *Client Entry survey* is presented to the customer after they fill in their trouble-ticket information and before the ticket is added to the ticket queue. This survey may be used to gather demographic information about the customer or determine whether they have visited your eCare Service Center before.
- The *Client Exit survey* is presented to the customer when their eCare session is complete and the Support Agent resolves their trouble ticket. This survey may be used to gather customer satisfaction information, determining whether the customer was pleased with the eCare service and the assistance provided by the Support Agent.
- The *Agent Entry survey* is presented to the Support Agent when they accept a trouble ticket. This survey may be used to determine whether Support Agents tend to receive adequate information from the data the customer submitted.
- The *Agent Exit survey* is presented to the Support Agent when an eCare session is complete and the Support Agent resolves the trouble ticket. This survey may be used to gather suggestions for new customer support or knowledge base documentation, or determine areas in which your Support Agents may require additional training or technical assistance.
- The *Agent Logout survey* is presented to the Support Agent when they sign out of the eCare Service Center. This survey may be used to gather information about the Support Agent's overall eCare experience.

You can control which surveys are used with the *Surveys* controls on the *Features* tab in the eCare Preferences Manager. See "Features: Enabling and Disabling eCare Features" on page 36.

Survey Components

Every eCare survey is comprised of

- An HTML form that contains the survey text, including questions, answers, and explanatory text. Each question and answer is an HTML input element. Each survey uses a unique HTML file, which you may edit individually.
- A JSP page, in which the HTML form is embedded when the survey is presented. The JSP page references the *survey.js* file for the functions needed to process the survey. All surveys use the same JS and JSP files.
- An optional *survey.css* file, which controls styles only for eCare surveys. Survey appearance may also be controlled with the *Appearance* tab in the eCare Preferences Manager (see page 33) or the *custom.css* file (see page 49), but the *survey.css* file overrides both of these.

When the survey is filled out and submitted, the results are emailed as an XML string to the email address you specify on the *Options* tab in the eCare Preferences Manager (see page 33).

Customizing Survey Questions, Answers, and Appearance

If the default survey questions do not fit your needs, you can modify them or add more questions as desired.

The first time you edit surveys, you can download their default HTML files, JSP file, and CSS file from

http://<ecare-server>/<service-name>/ecare4/templates.zip

If you are satisfied with the number of questions in the default survey, you need to edit only the HTML file. If any survey requires more than 4 questions answered with radio buttons, you will need to edit the JSP file as well.

Editing the HTML File

To edit the HTML include file, open it in any text editor.

<script> Section

At the top of each HTML include file is a `<script>` section. The `if (survey)` statement within this section specifies the information items that will be

submitted along with the survey responses. You may edit this section if you wish to change the information items that are submitted with the survey results.

For example, the Agent Logout Survey includes the following section.

```
if (survey)
{

   survey.info_agent_name.value = agentBean.firstName
      + " " + agentBean.lastName;
   survey.info_agent_phone.value = agentBean.phone;
   survey.info_agent_email.value = agentBean.email;

}
```

Each information item is in the form

survey.*infoItemID*.value = *dataBean*.*dataBeanField*

where

infoItemID Specifies an identifier for the information item that will appear in the survey email.

For example, the information item specified by

`survey.info_agent_phone.value`

will appear in the email as

`<info_agent_phone>5551212</info_agent_phone>`

You may use any sort of identifier you wish. However, it should not contain spaces.

dataBean Specifies the data bean JavaScript object that contains the desired information item in the form of a data bean field.

For a list of valid data beans, see the table "Available Data Beans" below.

dataBeanField

Specifies the data bean field that corresponds to the desired information item.

For a list of valid data bean fields, see the table “Available Data Bean Fields” below.

Available Data Beans	
Survey Type	**Data Beans Available**
Client Entry	userBean, clientTicketBean
Client Exit	userBean, clientTicketBean
Agent Entry	userBean, agentTicketBean, agentBean
Agent Exit	userBean, agentTicketBean, agentBean
Agent Logout	agentBean

Available Data Bean Fields	
Data Bean	**Data Bean Fields Available**
userBean	firstName, lastName, phone, email
clientTicketBean	ticketId, ticketStatus, ticketStatusString, ticketServicingAgentName, description, authToken, createDate, createdTime, localizedCreatedTime
agentTicketBean	description, ticketId, createdDate, CreatedTime, localizedCreatedTime, servicingAgentName, servicingAgentId, serviceTime, ticketStatus
agentBean	email, firstName, lastName, phone, agentId, alias

Note: If you add or change an *`infoItemID`* in the `<script>` section, you must also edit the `<input>` lines in the survey form. See the following section.

HTML Questions Section

Below the `<script>` section is the HTML for the survey form and content.

If you added or changed an *`infoItemID`* in the `<script>` section, you must edit the series of `<input>` lines within the form to match.

```
<input type=hidden name="infoItemID" value="" >
```

For example, if you added the `agentID` information item by adding the line

```
survey.info_agent_ID.value = agentBean.agentID;
```

You must also add the `<input>` line

```
<input type=hidden name="info_agent_ID" value="" >
```

Then edit the survey questions and answers using the default questions as a model. When you are finished, save and close the file.

If your survey uses up to four questions, you are ready to upload the new survey file. See "Upload: Uploading Custom Files" on page 38. If your survey includes more than four questions, however, you will need to modify the default *survey.js* file. Continue to the following section.

Editing the survey.js File

If your survey uses up to four questions, you do not need to modify the default default *survey.js* file. If your survey includes more than four questions, however, you will need to add an additional line for each question.

To edit the *survey.js* file, open it in any text editor.

At the top of the *survey.js* file, edit the `fixRadioButtons` function by adding a new `storeGroupAnswer` line for each new question.

```
function fixRadioButtons()
{
   storeGroupAnswer(document.SurveyForm.q1_local,
      document.SurveyForm.q1_answer);
   storeGroupAnswer(document.SurveyForm.q2_local,
      document.SurveyForm.q2_answer);
   storeGroupAnswer(document.SurveyForm.q3_local,
      document.SurveyForm.q3_answer);
   storeGroupAnswer(document.SurveyForm.q4_local,
      document.SurveyForm.q4_answer);
}
```

The total number of `storeGroupAnswer` lines must match the number of questions in the survey with the largest number of questions. Extra `storeGroupAnswer` lines are acceptable.

When you are finished, save and close the file. Then upload the saved file as described in "Upload: Uploading Custom Files" on page 38.

Editing the survey.css File

The optional *survey.css* file controls styles only for eCare surveys. By default, the *survey.css* file is empty. You can add styles to the file to customize survey appearance. To edit the *survey.css* file, open it in any text editor.

The *survey.css* file uses standard CSS format. To determine the classes used by each element in your survey, view the survey HTML include files. You may also create custom classes when you edit the survey files.

Note: Survey appearance may also be controlled with the *Appearance* tab in the eCare Preferences Manager (see page 33) or the *custom.css* file (see page 49). The *survey.css* file overrides both of these.

Adding the Session Duration to an Exit Survey

If desired, you may add the session duration to the eCare exit surveys, which are presented to the customer and Support Agent when the Support Agent resolves the trouble ticket.

To add the session duration to an exit survey

1. In any text editor, open the HTML include file for the customer or Support Agent exit survey.
2. Add the following line to the *clientExitSurvey_include.html* file.

```
<input type=hidden name="info_duration"
value="<%=StringUtil.timeStrFromSecs((System.currentTimeMillis() -
theClientTicketBean.getCreatedTime().getTime()) / 1000)%>">
```

   For the *agentExitSurvey_include.html* file, replace `theClientTicketBean` with `theAgentTicketBean`.

3. Save and close the file.
4. Upload the changed files to your eCare server. See "Upload: Uploading Custom Files" on page 38.

You do not need to restart the eCare server. The new surveys, if enabled, will take effect immediately.

Note: The session duration reported by exit surveys is longer than the duration reported in the eCare Reporting Center. eCare Reports calculate session duration as the interval between when the ticket was submitted and when it was resolved. Exit surveys calculate the duration as the interval between when the ticket was submitted and when the customer or Support Agent submitted the exit survey.

Uploading Surveys and Support Files

Once you have edited the desired survey HTML include files, JS file, and CSS file, upload them to the eCare server. For details about the file upload feature, see "Upload: Uploading Custom Files" on page 38.

You do not need to restart the eCare server. The new surveys, if enabled, will take effect immediately.

Enabling Surveys and Setting Options

Once your surveys and survey support files have been uploaded, you can control which surveys are used. Use the *Surveys* controls on the *Features* tab in the eCare Preferences Manager. See "Features: Enabling and Disabling eCare Features" on page 36.

The Preferences Manager can also control other survey options:

- When a customer or Support Agent submits an eCare survey, eCare sends it to the email address you specify on the *Options* tab. The "From" address attached to the email is also set here. See "Specifying Survey Email Addresses" on page 33.
- With the *Appearance* tab, you can control styles that you did not include in the *survey.css* file. (For surveys, the *survey.css* file overrides settings you make on the *Appearance* tab.) See "Appearance: Customizing the Appearance of your eCare Service Center" on page 33.

Using Other Customizable Files

You can also customize other eCare support files, including style sheets and the email template used by the Email Invite service.

Customizing Style Sheets

The optional *custom.css* file controls eCare the appearance of many eCare elements. By default, the *custom.css* file does not exist. You can create and upload the file to manage eCare styles.

Note: eCare styles may also be controlled with the *Appearance* tab in the eCare Preferences Manager (see page 33). The *custom.css* file overrides the *Appearance* settings.

To edit the custos.css style sheet

1. With any text editor, create a new file called *custom.css*.
2. To find the correct name for the classes you wish to change, load the eCare page that contains those classes. Right-click the desired element and choose *View Source*.

   Note: Do not use the *View* ▸ *Source* menu option in your Web browser. This method will load the source for the eCare frameset, and will not display the class names.
3. Add the classes you wish to change to the *custom.css* file. Using standard CSS rules, specify the appearance for each class.

   The *custom.css* file uses standard CSS format.
4. Save and close the file.
5. Upload the file from the *Upload* tab in the eCare Preferences Manager. See "Upload: Uploading Custom Files" on page 38 for details. You do not need to restart the eCare server.
6. Shut down your Web browser to clear its cache. Then restart your browser and sign in to eCare to test your changes.

Customizing the Email Template

Using the *emailTemplates.xml* file, you can control the content and appearance of the email that eCare sends to the customer when a Support Agent submits an email invitation.

To edit the emailTemplates.xml file

1. If necessary, download the *emailTemplates.xml* file, located in the *templates.zip* package at

   http://<ecare-server>/<service-name>/ecare4/templates.zip

2. Open the file in any text editor.
3. Edit the email text carefully. You may also edit the text enclosed in the `<subject>` and `<sender>` tags.

   Elements that appear in all capital letters surrounded by @ symbols, such as @AGENTNAME@, are replaced with the appropriate text when the email is generated. Do *not* remove the @URL@ element, which is the alias for the URL the customer will use to connect directly to eCare. Do *not* change any of the XML tag names.

   Note: The `<sender>` element specifies the email address that will appear in the email invitation's From field. The email will not use the specific Support Agent's email address.

4. Once you have made your changes, save and close the file.
5. Upload the file from the *Upload* tab in the eCare Preferences Manager. See "Upload: Uploading Custom Files" on page 38 for details.
6. Restart the eCare server.

Chapter 6: Marae

The Marae system is the backbone on which eCare is built. With the Marae Administration page, you can restart eCare and manage several aspects of its shutdown behavior.

Restarting Your eCare Service

Before certain eCare configuration changes can take effect, you must shut down and restart your eCare service. These configuration changes include

- Assigning schedules to entry portals
- Changing URL and Chat shortcuts
- Adding and removing Email Notification addresses
- Modifying trouble-ticket display options
- Changing the color scheme for your eCare service

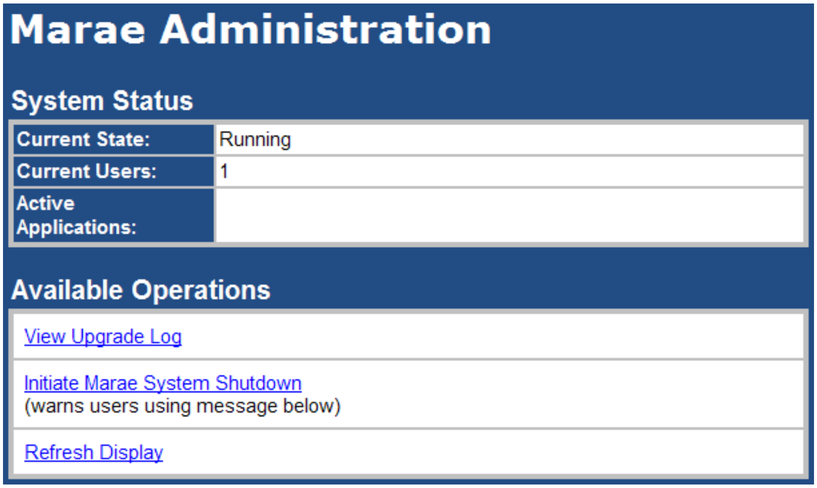
You do not need to restart your eCare service after each configuration change; you may wait to restart until after your have finished making all of your configuration changes.

Note: Only administrators with Site Admin privileges may restart the eCare service. By default, only the **superadmin** account for your eCare installation will have these privileges. If you have only Standard Admin privileges, contact your **superadmin** user to perform the restart.

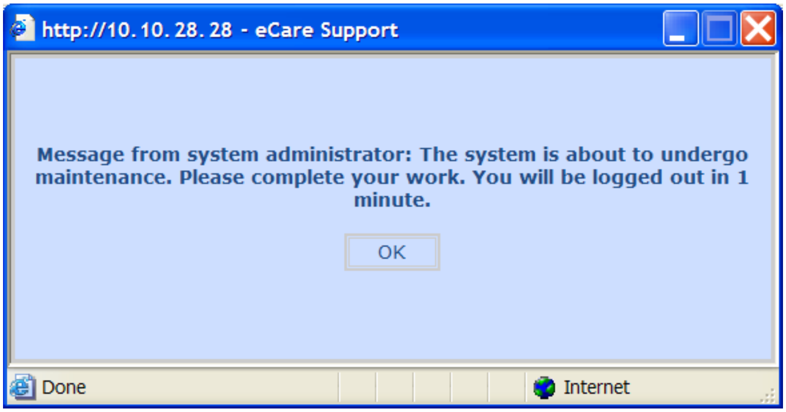
To shut down and restart your eCare service

1. On any eCare administration page, click the *Restart Service* button.

   eCare displays the server's operational status window.



2. Click the *Initiate Marae System Shutdown* link to begin shutting down the eCare service.
   - If no delay period is specified in the *Auto Shutdown Delay* field at the bottom of the page, the eCare service is shut down immediately. All eCare sessions for your eCare service are terminated. Any active customers or Support Agents are forced off the eCare service.
   - If a delay period is specified in the *Auto Shutdown Delay* field, the shutdown will occur after the delay period elapses. During this interval, customers and Support Agents who are currently in an active eCare session will be warned of the pending shutdown.



To cancel the shutdown during the delay period, click *Cancel Marae System Shutdown*. To override the delay and shut the eCare service down immediately, click *Shutdown Marae System*.

When the countdown is complete, all eCare sessions for your eCare service are terminated. Any active customers and Support Agents are forced off the eCare service.

3. When the shutdown is complete, the *Current State* information item displays *Shutdown* and the *Start Marae System* link replaces the *Initiate Marae System Shutdown* link. Click the *Start Marae System* link to restart your eCare service.

The restart is complete when *Current State* information item returns to *Running*.

Manually Restarting your eCare Service

In certain situations, you may need to restart your eCare service manually. For example, if you shut down eCare but close your browser before restarting it, you will not be able to sign in to eCare to access the Marae Administration page.

In this situation, open the Marae Administration page directly by entering the following URL.

http://‹ecare-server›/‹service-name›/manage

Sign in with your administrator credentials, and then follow the "To shut down and restart your eCare service" procedure above to restart the eCare service.

Using the Upgrade Report

eCare now generates an upgrade report when you upgrade an existing eCare service to eCare 4.5.2 (or later). On the Marae Administration page, click the *View Upgrade Log* link to display the report.

The upgrade report includes such items as updates, changes, or additions to database tables, changes to certain configuration files, and certain bug fixes.

The report also includes a listing of any changes made during the upgrade to data stored in the eCare database. This report, along with pre-upgrade database backups, allows you to maintain a complete audit trail of all eCare data.

When you click the *View Upgrade Log* link, the upgrade report opens in a new window. The data it includes may vary depending on the previous versions of eCare you have installed, the size of your database, and other factors. If any data in your eCare database was changed, click the *Details* link for information about the change.

Managing Marae Settings

In addition to starting and shutting down the eCare service, the Marae Administration page provides status information and controls a number of shutdown behavior options.

- The *System Status* area provides a quick overview of eCare status and the number of active users.
- The *Available Operations* provides controls for shutting down and restarting eCare.
- The *System Settings* area specifies certain aspects of shutdown behavior. See "Specifying System Settings," below.
- The *Startup Log* area logs the events that occur during system startup.

Specifying System Settings

The *System Settings* area specifies certain aspects of shutdown behavior.

- ***Shutdown Web-page Text***—Specifies the text that appears when any user attempts to access any eCare URL while the server is shut down. Note that this

is *not* the Closed Action that occurs when the eCare portal is closed but the eCare server is still running. (See "Setting Up Closed Actions" on page 23 for information about Closed Actions.)

- ***Shutdown Warning Message***—Specifies the text that appears in the warning dialog box that appears to active users when you initiate a system shutdown.
- ***Shutdown Cancelled Message***—Specifies the text that appears in the dialog box that appears to notify active users that you have cancelled a pending system shutdown.
- ***Auto Shutdown Delay***—Specifies the time period, in seconds, that elapses between the time you click the *Initiate Marae System Shutdown* link and the time the shutdown occurs.

To change any of the settings, enter the new message or delay time and click the *Update* button associated with the field.

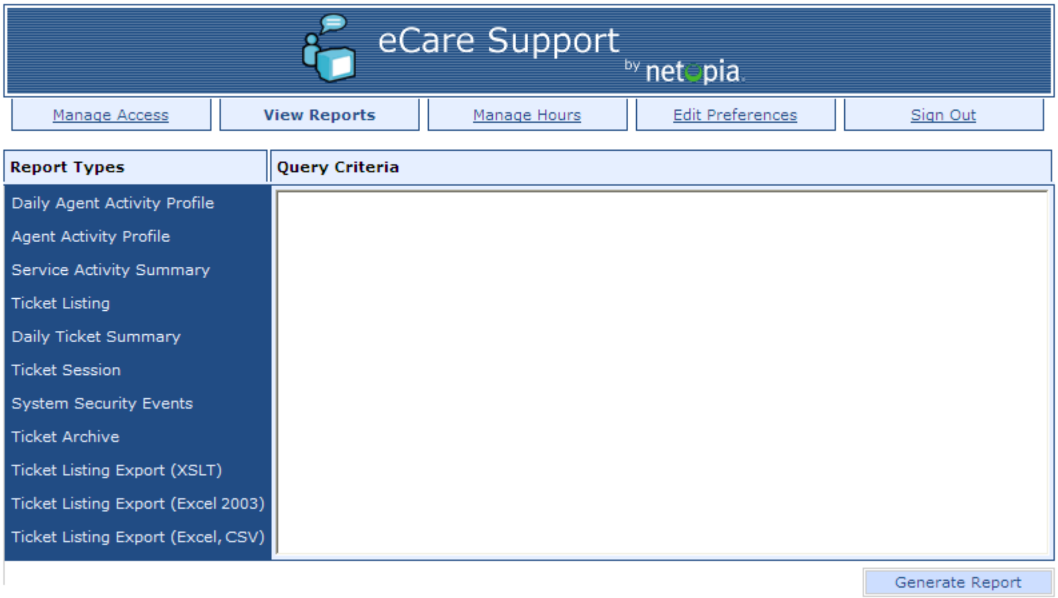
Note: If you wish to change more than one setting, you must change them one at a time. Change the first setting, click *Update*, and then change the next setting. When you click the *Update* for any field, any changes to other fields are discarded.

Appendix A: eCare Reporting Center

In the eCare Reporting Center, you can generate reports that summarize the activity on your eCare system and monitor the performance of specific Support Agents or your entire support team.

To open the eCare Reporting Center, click the *View Reports* button at the top of the Manage Access page.

The eCare Reporting page opens.



From the main eCare Reporting page, you may generate many different report types:

- **Daily Agent Activity Profile**, which provides a day-by-day summary of each trouble ticket handled by one or more Support Agents. See page 58.
- **Agent Activity Profile**, which provides a report of the eCare sessions handled by individual Support Agents. See page 59.
- **Service Activity Summary**, which lists each eCare service and indicates the amount of usage for each service. See page 63.
- **Ticket Listing**, which provides a list of eCare sessions that match the criteria you specify. See page 64.
- **Daily Ticket Summary**, which provides a day-by-day summary of the trouble tickets handled by one or more Support Agents and how the trouble tickets were resolved. See page 67.
- **Ticket Session**, which provides a summary of a single eCare session. See page 69.
- **System Security Events**, which provides a list of security- and account-related activity on your eCare server. See page 71.
- **Ticket Archive**, which allows you to view (and save to your computer) a full transcript of a single eCare session. Depending on your eCare installation, you may also be able to save and play back recordings of eCare remote-control sessions. See page 73.
- **Ticket Listing Export (XSLT)**, which allows you to export an XML file that contains a summary of eCare sessions that match the criteria you specify. See page 76.
- **Ticket Listing Export (Excel 2003)**, which allows you to export an XML file, which you can import into Microsoft Excel 2003, containing a summary of eCare sessions that match the criteria you specify. See page 79.
- **Ticket Listing Export (Excel, CSV)**, which allows you to export a CSV file, which you can import into Microsoft Excel, containing a summary of eCare sessions that match the criteria you specify. See page 82.

Each option is discussed further in the following sections.

Note: All the eCare reports you generate will match *all* the criteria you specify in the report query. eCare queries do not support wildcards.

All timestamps in the eCare Reporting Center are U.S. Central Standard Time.

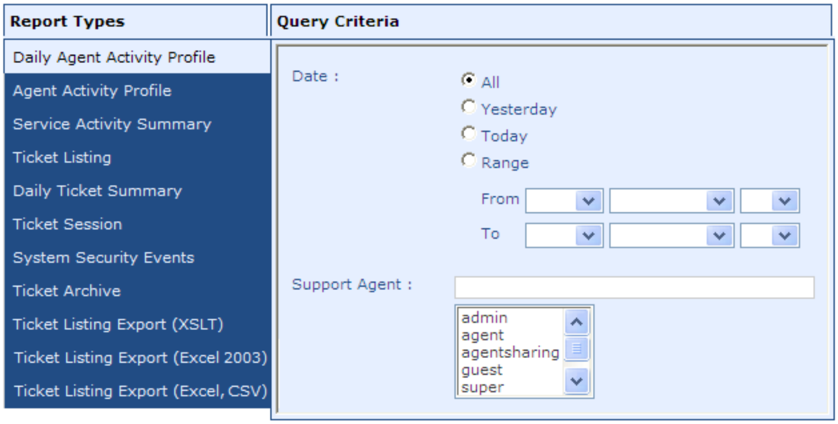
Generating and Using a Daily Agent Activity Profile

The Daily Agent Activity Profile provides a day-by-day summary of each trouble ticket handled by a single Support Agent (or by multiple Support Agents, reported individually). The report lists each trouble ticket handled by the specified Support Agent, the session duration, and whether it was Resolved or Escalated.

For example, with this report you can quickly determine whether your Support Agents are handling the expected number of trouble tickets, whether the average length of their eCare sessions is within expected limits, and whether they are escalating the expected number of trouble tickets.

To generate a Daily Agent Activity Profile

1. Open the Daily Agent Activity Profile query page by clicking the link on the main eCare Reporting page.



2. In the *Date* area, choose a radio button to specify the day or time period you wish to search. If you choose the *Range* option, use the drop-down lists to specify a date range.
3. In the *Support Agent* list, double-click the user ID of the Support Agent or administrator for whom you wish to generate a report. (Note that the selection must appear in the *Support Agent* text box; if it is only highlighted in the list, it will not be used.) *Guest* indicates all activity related to your eCare customers.

Separate multiple user IDs with commas. User IDs are case-sensitive. The *Support Agent* text box does not allow a partial-name or wildcard search.

If you do not specify a user ID in the *Support Agent* text box, the generated report will include activity for all users.

4. Click *Generate Report* to generate the report.

The output report displays a summary of the ticket dispositions that match your search criteria. If you enter no search criteria in the form, all eCare sessions for all Support Agents will be included.

Daily Agent Activity Profile

Date : 2006-08-22 through 2006-08-24
Support Agent : cleon

Support Agent	Created	Ticket ID	Wait Time	Duration	Escalated	Resolved
cleon						
	Aug 22, 2006	1430	14	221		Yes
	Aug 22, 2006	1431	10	772	Yes	Yes
	Aug 22, 2006	1434	9	1173		Yes
	Subtotal/Avg.	3 tickets	11.0	722.0	1	3
	Aug 23, 2006	1435	23	272	Yes	
	Aug 23, 2006	1437	164	883	Yes	
	Aug 23, 2006	1438	9	299	Yes	
	Aug 23, 2006	1439	15	113		Yes
	Aug 23, 2006	1441	46	215	Yes	
	Subtotal/Avg.	5 tickets	51.4	356.4	4	1
	Aug 24, 2006	1443	5	73		Yes
	Aug 24, 2006	1444	7	120		Yes
	Subtotal/Avg.	2 tickets	6.0	96.5	0	2
Total/Avg.		10 tickets	30.2	414.1	5	6
Report Total/Avg.		10 tickets	30.2	414.1	5	6

Generating and Using an Agent Activity Profile

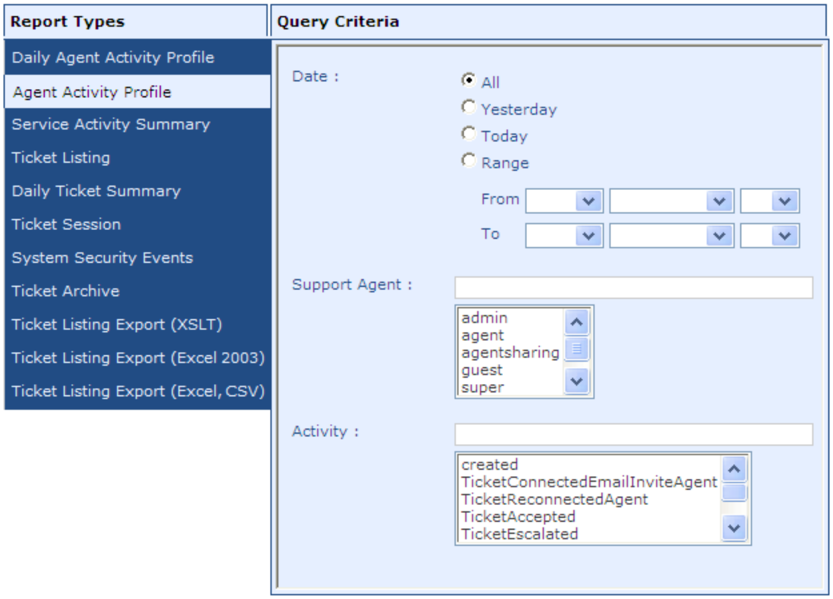
The Agent Activity Profile provides a report of the eCare services an individual Support Agent (or multiple Support Agents, reported individually) used during their eCare sessions.

Note: In this context, *eCare service* refers to the different types of remote-control and file-transfer services that a Support Agent can use during an eCare session. It does not refer to multiple eCare services residing on different servers or URLs.

For example, with this report you can determine whether a specific Support Agent is making full use of all services and spending the expected amount of time using different services.

To generate an Agent Activity Profile

1. Open the Agent Activity Profile query page by clicking the link on the main eCare Reporting page.



2. In the *Date* area, choose a radio button to specify the day or time period you wish to search. If you choose the *Range* option, use the drop-down lists to specify a date range.
3. In the *Support Agent* list, double-click the user ID of the Support Agent or administrator for whom you wish to generate a report. (Note that the selection must appear in the *Support Agent* text box; if it is only highlighted in the list, it will not be used.) *Guest* indicates all activity related to your eCare customers.

   Separate multiple user IDs with commas. User IDs are case-sensitive. The *Support Agent* text box does not allow a partial-name or wildcard search.

   If you do not specify a user ID in the *Support Agent* text box, the generated report will include activity for all users.

4. In the *Activity* list, double-click the type of eCare session activity for which you wish to generate the report. (Note that the selection must appear in the *Activity* text box; if it is only highlighted in the list, it will not be used.)

   For example, *TicketAccepted* allows you to view all eCare sessions that were accepted by a Support Agent, whether or not they were resolved, while *TicketEscalated* allows you to view only the sessions that were escalated. See "Session Activity Types" on page 62 for information about the available session-activity types.

   Separate multiple session-activity types with commas. Activity types are case-sensitive. The *Activity* text box does not allow a partial-name or wildcard search.

   If you do not specify a session-activity type in the *Activity* text box, the generated report will include all eCare sessions.

5. Click *Generate Report* to generate the report.

The report displays a list of eCare sessions that match your search criteria. If you enter no search criteria in the form, all eCare session listings will be retrieved.

Note that the report lists only the activity that relates to eCare support sessions. Administrative activity is not reported in the Agent Activity Profile.

Agent Activity Profile

Date : All
Activity : All
Support Agent : All

Support Agent	Activity	Tickets	Min Time	Max Time	Avg Time	Total Time
peri	Remote User Viewing	2	00:00:57	20:43:46	13:49:29	41:28:29
peri	Remote User Assist	3	00:02:17	07:12:20	02:37:00	07:51:02
peri	Examine System	4	00:01:10	08:24:14	02:31:21	10:05:25
peri	URL Push	1	00:03:56	00:03:56	00:03:56	00:03:56
peri	Support Agent Assist	5	00:00:57	20:43:46	08:13:15	49:19:31
peri	Chat	8	00:03:56	08:24:14	02:32:02	32:56:30
Totals for	peri	23				21:44:53
cleon	Remote User Viewing	22	00:05:40	05:29:34	01:04:44	52:52:19
cleon	Support Agent File Transfer	33	00:00:00	02:35:13	00:48:56	36:42:39
cleon	Remote User File Transfer	42	00:00:00	05:29:34	00:57:58	51:13:13
cleon	Remote User Assist	107	00:01:10	07:17:48	00:48:53	22:37:13
cleon	Examine System	89	00:00:00	08:24:14	01:04:11	03:01:38
cleon	URL Push	67	00:00:00	06:34:12	00:48:33	04:44:08
cleon	Support Agent Assist	139	00:00:00	07:17:48	00:48:01	24:06:08
cleon	Chat	211	00:00:00	08:24:14	00:59:50	59:47:20
Totals for	cleon	710				15:04:38
mina	Remote User Viewing	2	00:26:23	08:19:33	05:41:49	17:05:29
mina	Support Agent File Transfer	2	04:56:13	08:19:33	06:37:53	13:15:46
mina	Remote User File Transfer	2	00:26:23	08:19:33	02:24:40	09:38:42
mina	Remote User Assist	3	00:03:50	08:19:33	02:56:35	08:49:46
mina	Examine System	2	00:26:23	08:19:33	04:22:58	17:31:52
mina	URL Push	2	04:56:13	08:19:33	06:37:53	13:15:46
mina	Support Agent Assist	3	00:03:50	08:19:33	04:19:12	25:55:15
mina	Chat	10	00:00:00	08:19:33	04:32:03	21:37:16
Totals for	mina	26				07:09:52
Totals for All		774				46:19:26

Session Activity Types

The *Activity* text box and list allows you to limit the search results to eCare sessions meeting certain criteria.

- **Created**—The trouble ticket was created; it may or may not have been accepted or resolved.
- **TicketConnectedEmailInviteAgent**—The trouble ticket was created when the customer clicked the link in an email invitation; it may or may not have been accepted or resolved.
- **TicketReconnectedAgent**—The trouble ticket was created when the customer reconnected to eCare after a reboot or session interruption; it may or may not have been accepted or resolved.
- **TicketAccepted**—The trouble ticket was accepted; it may or may not have been resolved.
- **TicketEscalated**—The trouble ticket was escalated.
- **TicketAbandoned**—The trouble ticket was abandoned by the eCare customer (the customer left eCare before or during the eCare session).

- **TicketDeleted**—The trouble ticket was deleted by a Support Agent.
- **TicketResolved**—The trouble ticket was resolved.

Generating and Using a Service Activity Summary

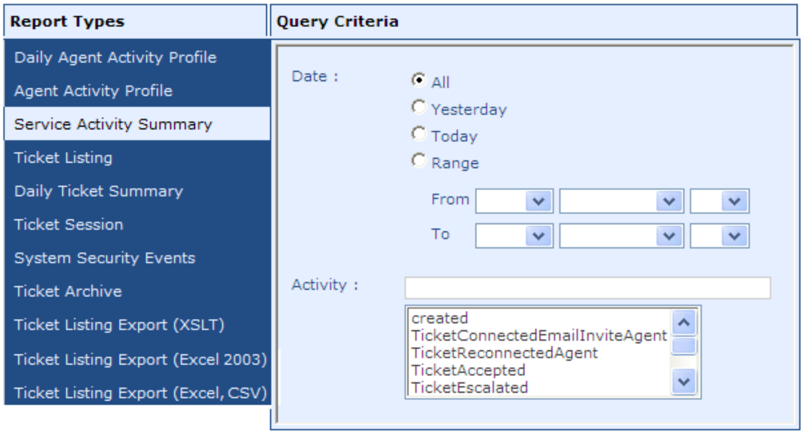
The Service Activity Summary lists each eCare service and indicates the amount of usage for each service.

Note: In this context, *eCare service* refers to the different types of remote-control and file-transfer services that a Support Agent can use during an eCare session. It does not refer to multiple eCare services residing on different servers or URLs.

For example, with this report you can determine whether, as a team, your Support Agents are making full use of all services, and whether they are spending the expected amount of time using different services.

To generate a Service Activity Summary

1. Open the Service Activity Summary query page by clicking the link on the main eCare Reporting page.



2. In the *Date* area, choose a radio button to specify the day or time period you wish to search. If you choose the *Range* option, use the drop-down lists to specify a date range.

3. In the *Activity* list, double-click the type of eCare session activity for which you wish to generate the report. (Note that the selection must appear in the *Activity* text box; if it is only highlighted in the list, it will not be used.)

   For example, *TicketAccepted* allows you to view all eCare sessions that were accepted by a Support Agent, whether on not they were resolved, while *TicketEscalated* allows you to view only the sessions that were escalated. See “Session Activity Types” on page 62 for information about the available session-activity types.

   Separate multiple session-activity types with commas. Activity types are case-sensitive. The *Activity* text box does not allow a partial-name or wildcard search.

   If you do not specify a session-activity type in the *Activity* text box, the generated report will include all eCare sessions.

4. Click *Generate Report* to generate the report.

The output report displays a summary of the service usage on your eCare server that matches your search criteria. If you enter no search criteria in the form, all eCare service activity will be retrieved.

Service Activity Summary

Date : All
Activity : All

Service	Num Agents	Num Tickets	Avg Time	Total Time
Chat	5	147	01:08:41	55:22:16
Examine System	5	97	01:11:54	31:01:17
Remote User Assist	6	116	00:52:04	39:42:06
Support Agent Assist	6	150	01:02:09	39:44:59
Remote User Viewing	3	26	02:01:34	51:26:17
Support Agent Viewing	0	0	00:00:00	00:00:00
Support Agent File Transfer	2	29	01:03:47	49:58:25
Remote User File Transfer	2	37	01:04:04	00:51:55
URL Push	4	71	00:55:51	18:12:11

Generating and Using a Ticket Listing Report

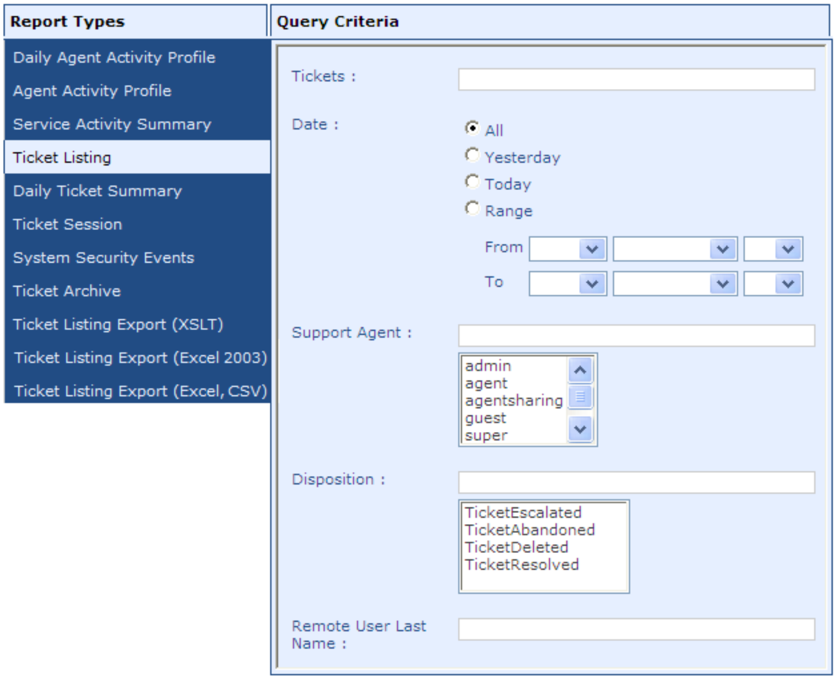
The Ticket Listing Report provides a list of all eCare sessions that match the criteria you specify.

For example, with this report you can find all trouble tickets that were escalated during a certain period, or all trouble tickets that were submitted by a particular customer. The Ticket Listing report is the primary mechanism for locating ticket

transcripts, Examine System results, and session recordings when you do not know the exact trouble ticket ID number.

To generate a Ticket Listing Report

1. Open the Ticket Listing query page by clicking the link on the main eCare Reporting page.



2. In the *Tickets* text box, enter the trouble ticket ID number associated with the eCare session you wish to retrieve.

   You may enter multiple ticket numbers, separated by commas.

3. In the *Date* area, choose a radio button to specify the day or time period you wish to search. If you choose the *Range* option, use the drop-down lists to specify a date range.

4. In the *Support Agent* list, double-click the user ID of the Support Agent or administrator for whom you wish to generate a report. (Note that the selection must appear in the *Support Agent* text box; if it is only highlighted in the

list, it will not be used.) *Guest* indicates all activity related to your eCare customers.

Separate multiple user IDs with commas. User IDs are case-sensitive. The *Support Agent* text box does not allow a partial-name or wildcard search.

If you do not specify a user ID in the *Support Agent* text box, the generated report will include activity for all users.

5. In the *Disposition* list, double-click the ticket disposition type for which you wish to generate the report. (Note that the selection must appear in the *Disposition* text box; if it is only highlighted in the list, it will not be used. See “Ticket Disposition Types” on page 67 for information about the available disposition types.)

   Separate multiple disposition types with commas. Disposition types are case-sensitive. The *Disposition* text box does not allow a partial-name or wildcard search.

   If you do not specify a disposition type in the *Disposition* text box, the generated report will include all tickets.

6. In the *Remote User Last Name* text box, enter the last name of the customer whose ticket you wish to retrieve.

   Separate multiple last names with commas. Last names are case-sensitive. The *Remote User Last Name* text box does not allow a partial-name or wildcard search.

7. Click *Generate Report* to generate the report.

The output report displays a list of the eCare sessions that match your search criteria. If you enter no search criteria in the form, all eCare sessions will be retrieved.

Ticket Listing

Tickets : All
Date : All
Support Agent : All
Disposition : All
Remote User : Smith

Ticket ID	Archive	Support Agent	Duration	Wait Time	Disposition	Escalated	Created	Remote User
1051	View	cleon	01:17:02	01:16:35	TicketResolved	Yes	Oct 10, 2005 12:50:35 PM	S Smith
1057	View		00:00:00	00:00:00	TicketAbandoned		Oct 11, 2005 11:03:58 AM	Mike Smith
1187	View	peri	00:08:21	00:00:09	TicketResolved	Yes	Feb 24, 2006 5:58:50 PM	S Smith
1351	View	cleon	00:07:19	00:00:07	TicketResolved		Jun 21, 2006 12:15:24 PM	S Smith
1357	View	cleon	00:01:11	00:00:12	TicketResolved	Yes	Jun 21, 2006 3:55:30 PM	S Smith

- Click a ticket number in the *Ticket ID* column open the Ticket Session report for that eCare session. The Ticket Session report provides a summary of the

session, including such information as the session duration and services used. (See "Generating and Using a Ticket Session Report" on page 69 for details about this report.)

- Click *View* in the *Archive* column to open the Ticket Archive report for that eCare session. From the Ticket Archive report, you can open or download the session transcript and any associated Examine System reports or session recordings. (See "Generating and Using a Ticket Archive Report" on page 73 for details about this report.)

Ticket Disposition Types

The *Ticket Disposition* text box and list allow you to specify the method by which the eCare trouble ticket was closed.

- **TicketEscalated**—The trouble ticket was escalated.
- **TicketAbandoned**—The trouble ticket was abandoned by the eCare customer (the customer left eCare before or during the eCare session).
- **TicketDeleted**—The trouble ticket was deleted by a Support Agent.
- **TicketResolved**—The trouble ticket was resolved.

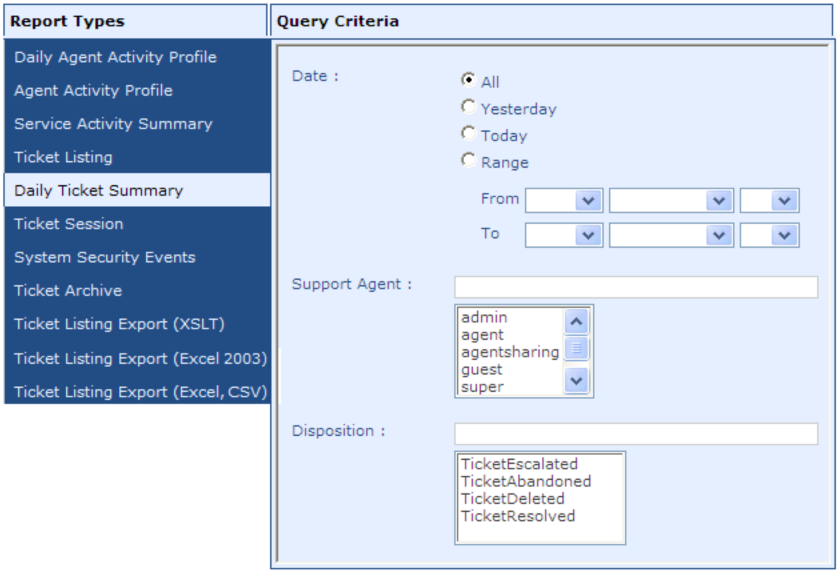
Generating and Using a Daily Ticket Summary

The Daily Ticket Summary provides a day-by-day summary of the trouble tickets handled by one or more Support Agents and how the trouble tickets were resolved. It indicates the total number of tickets handled by each Support Agent and specifies the number of tickets that were resolved and escalated.

For example, with this report you can determine the total number of trouble tickets a specific Support Agent accepted each day, or limit the report to only the trouble tickets the Support Agent escalated.

To generate a Daily Ticket Summary

1. Open the Daily Ticket Summary query page by clicking the link on the main eCare Reporting page.



2. In the *Date* area, choose a radio button to specify the day or time period you wish to search. If you choose the *Range* option, use the drop-down lists to specify a date range.
3. In the *Support Agent* list, double-click the user ID of the Support Agent or administrator for whom you wish to generate a report. (Note that the selection must appear in the *Support Agent* text box; if it is only highlighted in the list, it will not be used.) *Guest* indicates all activity related to your eCare customers.

   Separate multiple user IDs with commas. User IDs are case-sensitive. The *Support Agent* text box does not allow a partial-name or wildcard search.

   If you do not specify a user ID in the *Support Agent* text box, the generated report will include activity for all users.
4. In the *Disposition* list, double-click the ticket disposition type for which you wish to generate the report. (Note that the selection must appear in the *Disposition* text box; if it is only highlighted in the list, it will not be used. See

"Ticket Disposition Types" on page 67 for information about the available disposition types.)

Separate multiple disposition types with commas. Disposition types are case-sensitive. The *Disposition* text box does not allow a partial-name or wildcard search.

If you do not specify a disposition type in the *Disposition* text box, the generated report will include all tickets.

5. Click *Generate Report* to generate the report.

The output report displays a summary of the ticket dispositions that match your search criteria. If you enter no search criteria in the form, all eCare sessions for all Support Agents will be included.

Daily Ticket Summary

Date : 2006-08-01 through 2006-08-31
Support Agent : cleon
Disposition : TicketEscalated

Date	Support Agent	Accepted	Canceled	Resolved	Escalated	Deleted
2006-08-10	cleon	2	0	1	2	0
2006-08-22	cleon	1	0	1	1	0
2006-08-23	cleon	4	0	0	4	0
2006-08-29	cleon	1	0	0	1	0
2006-08-31	cleon	5	0	1	5	0
Totals		13	0	3	13	0

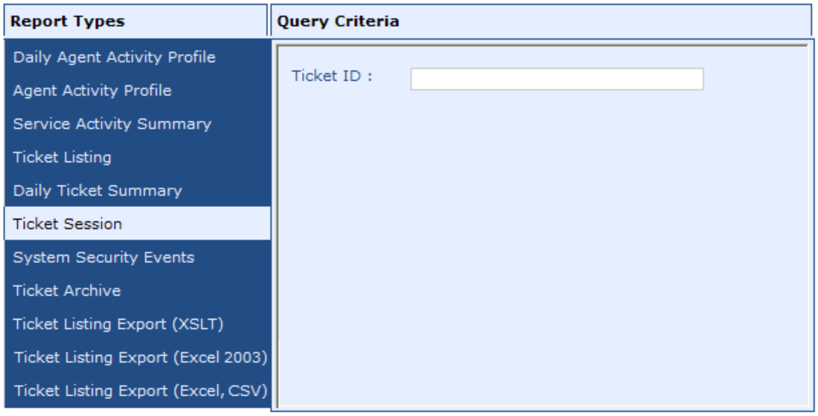
Generating and Using a Ticket Session Report

The Ticket Session Report provides a summary of a single eCare session.

For example, with this report you can quickly determine the session duration and services used during a single specific eCare session.

To generate a Ticket Session Report

1. Open the Ticket Session query page by clicking the link on the main eCare Reporting page.

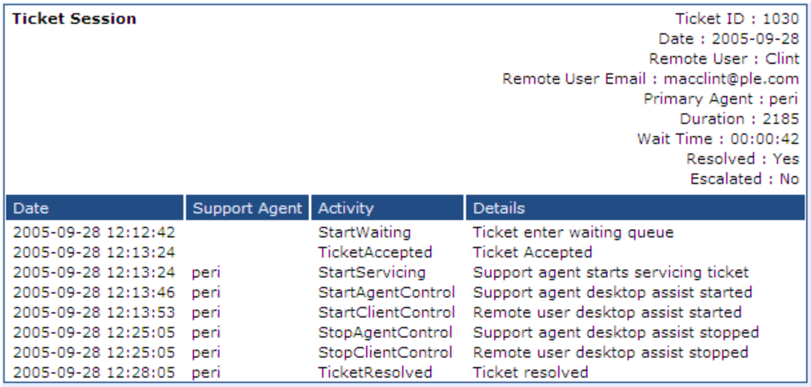


2. In the *Ticket ID* text box, enter the trouble ticket ID number associated with the eCare session you wish to retrieve.

   Enter only one ID number. You may not use partial numbers or wildcards.

3. Click *Generate Report* to generate the report.

The output report displays a summary of the eCare session you specified.



Ticket Session

Ticket ID : 1030
Date : 2005-09-28
Remote User : Clint
Remote User Email : macclint@ple.com
Primary Agent : peri
Duration : 2185
Wait Time : 00:00:42
Resolved : Yes
Escalated : No

Date	Support Agent	Activity	Details
2005-09-28 12:12:42		StartWaiting	Ticket enter waiting queue
2005-09-28 12:13:24		TicketAccepted	Ticket Accepted
2005-09-28 12:13:24	peri	StartServicing	Support agent starts servicing ticket
2005-09-28 12:13:46	peri	StartAgentControl	Support agent desktop assist started
2005-09-28 12:13:53	peri	StartClientControl	Remote user desktop assist started
2005-09-28 12:25:05	peri	StopAgentControl	Support agent desktop assist stopped
2005-09-28 12:25:05	peri	StopClientControl	Remote user desktop assist stopped
2005-09-28 12:28:05	peri	TicketResolved	Ticket resolved

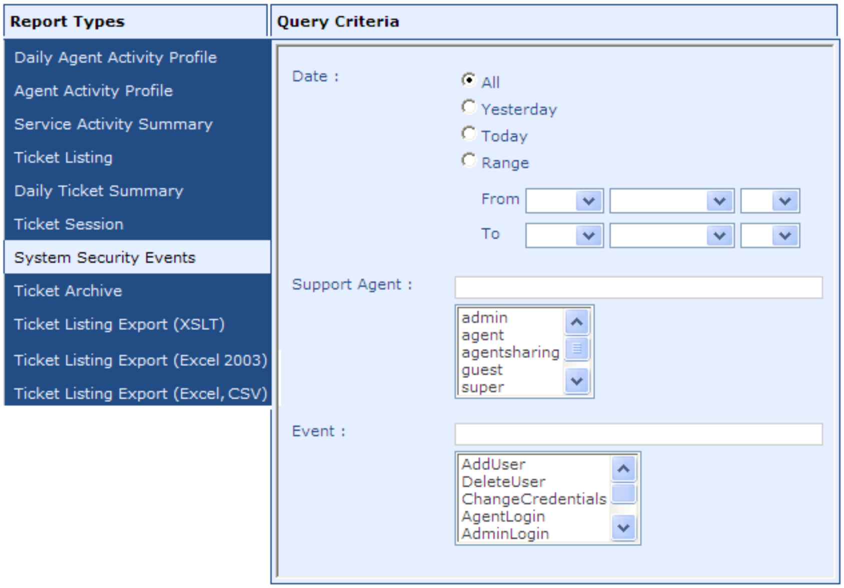
Generating and Using a System Security Events Report

The System Security Events Report provides a list of security- and account-related activity on your eCare server.

For example, with this report you can determine when a specific Support Agent signed in to eCare each day, or which Support Agents signed in on a specific day.

To generate a System Security Events Report

1. Open the System Security Events query page by clicking the link on the main eCare Reporting page.



2. In the *Date* area, choose a radio button to specify the day or time period you wish to search. If you choose the *Range* option, use the drop-down lists to specify a date range.
3. In the *Support Agent* list, double-click the user ID of the Support Agent or administrator for whom you wish to generate a report. (Note that the selection must appear in the *Support Agent* text box; if it is only highlighted in the

list, it will not be used.) *Guest* indicates all activity related to your eCare customers.

Separate multiple user IDs with commas. User IDs are case-sensitive. The *Support Agent* text box does not allow a partial-name or wildcard search.

If you do not specify a user ID in the *Support Agent* text box, the generated report will include activity for all users.

4. In the *Event* list, double-click the system event type for which you wish to generate the report. (Note that the selection must appear in the *Event* text box; if it is only highlighted in the list, it will not be used. See "System Event Types" on page 73 for information about the available system event types.)

   Separate multiple system event types with commas. System event types are case-sensitive. The *Event* text box does not allow a partial-name or wildcard search.

   If you do not specify a system event type in the *Event* text box, the generated report will include all system events.

5. Click *Generate Report* to generate the report.

The output report displays a list of the system events on your eCare server that match your search criteria. If you enter no search criteria in the form, all system event records will be retrieved.

System Security Events

Date : 2006-08-01 through 2006-08-31
Support Agent : peri
Event : AdminLogin

Support Agent	Date	Event	Details
peri	2006-08-10 12:21:52	AdminLogin	Administrator logged in to system: peri
peri	2006-08-15 10:44:51	AdminLogin	Administrator logged in to system: peri
peri	2006-08-15 16:39:24	AdminLogin	Administrator logged in to system: peri
peri	2006-08-15 16:53:40	AdminLogin	Administrator logged in to system: peri
peri	2006-08-16 13:14:40	AdminLogin	Administrator logged in to system: peri
peri	2006-08-21 14:30:01	AdminLogin	Administrator logged in to system: peri
peri	2006-08-21 20:23:56	AdminLogin	Administrator logged in to system: peri
peri	2006-08-22 10:54:09	AdminLogin	Administrator logged in to system: peri
peri	2006-08-22 16:51:11	AdminLogin	Administrator logged in to system: peri
peri	2006-08-23 11:08:04	AdminLogin	Administrator logged in to system: peri
peri	2006-08-25 14:12:55	AdminLogin	Administrator logged in to system: peri
peri	2006-08-25 14:24:02	AdminLogin	Administrator logged in to system: peri
peri	2006-08-25 19:33:49	AdminLogin	Administrator logged in to system: peri
peri	2006-08-29 07:36:19	AdminLogin	Administrator logged in to system: peri
peri	2006-08-29 09:52:35	AdminLogin	Administrator logged in to system: peri
peri	2006-08-30 10:36:40	AdminLogin	Administrator logged in to system: peri
peri	2006-08-31 11:40:51	AdminLogin	Administrator logged in to system: peri

System Event Types

The *System Event* text box and list allow you to specify the system event types for which you wish to retrieve records.

- **AddUser**—A new user profile was created in the eCare system.
- **DeleteUser**—The indicated user profile was deleted from the eCare system.
- **ChangeCredentials**—The indicated user profile was modified with a new Role Selection. (Note that only role changes are logged here.)
- **AgentLogin**—The indicated Support Agent signed in to the eCare system.
- **AdminLogin**—The indicated administrator signed in to the eCare system.
- **ClientLogin**—An eCare customer signed in to the eCare system.
- **LeftEcare**—The indicated user signed out of the eCare system.

Note: In the *Support Agent* column, *guest* always indicates a remote user or eCare customer.

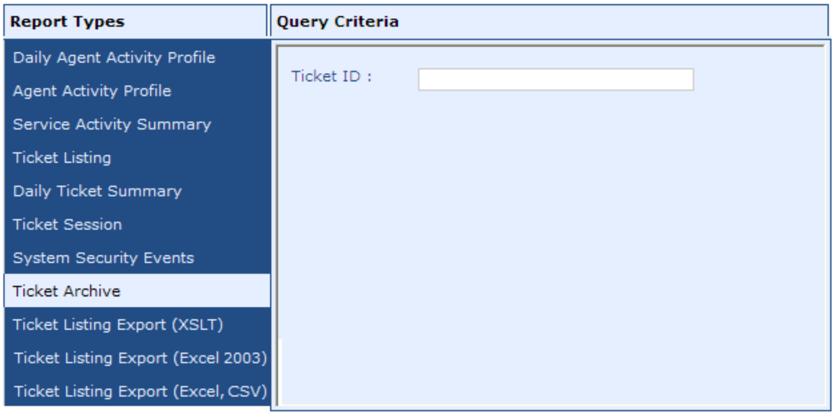
Generating and Using a Ticket Archive Report

The Ticket Archive Report allows you to view and save a full transcript of a single eCare session. Depending on your eCare installation, you may also be able to view Examine System reports or save and play back recordings of eCare remote-control sessions.

For example, with this report you can quickly load the transcript, Examine System report, and session recordings for a specific eCare session.

To generate a Ticket Archive Report

1. Open the Ticket Archive query page by clicking the link on the main eCare Reporting page.



2. In the *Ticket ID* text box, enter the trouble ticket ID number associated with the eCare session you wish to retrieve.

   Enter only one ID number. You may not use partial numbers or wildcards.

3. Click *Generate Report* to generate the report.

The Ticket Archive window opens, displaying one or more report links.

Ticket Archive			Ticket ID : 1098
File Name	Description	Date Created	Time Created
Main.1098.2006-11-02-11-58-23.html	Transcript for Ticket 1098	2006-11-02	12:04:13

- To view the session transcript, click the link on the *Transcript for Ticket* line. The report displays a full transcript of the eCare session you specified.
- To save the transcript to your local computer, right-click the link and choose *Save Target As*.

Saved Examine System Reports

If the Support Agent used the Examine System service during the eCare session, and the *Enable System to Save Analysis Report* option is selected on the *Features* tab in the eCare Preferences Manager (see page 36), the Ticket Archive report will include a link to the saved Examine System report.

Ticket Archive — Ticket ID : 1097

File Name	Description	Date Created	Time Created
Main.1097.2006-11-02-12-08-49.analyze.xml	System analysis for Ticket 1097	2006-11-02	12:08:49
Main.1097.2006-11-02-11-58-07.html	Transcript for Ticket 1097	2006-11-02	12:13:11

To view the Examine System Report

1. In the Ticket Archive window, click the link on the *System Analysis* line.
2. In the File Download dialog box, choose *Open*. The XML file will open in a new Internet Explorer window.

   You may also choose *Save* to save a local copy of the file.

Note that unlike the Examine System report that is displayed during the eCare session, the saved Examine System file is in raw XML format, without special processing. The saved report is intended for in-depth diagnostic purposes.

You may also open the saved Examine System report from within the session transcript. Click the link in the transcript line "The system analysis data can be seen by clicking here."

Remote Control Session Recording

eCare includes an optional configuration module that records each remote-control session in an individual file. The session-recording file captures the entire remote-control session from the Support Agent's perspective in real-time. The session recording can be played back for training or security purposes.

Note: To enable session recording, Netopia must perform a special configuration for your eCare Service Center. Once this configuration has occurred, all remote-control sessions will be recorded. A message will appear on the trouble-ticket form, warning your customers that the session will be recorded.

The session-recording link appears in the Ticket Archive report, along with the *Download Player* link. Before you can view remote-control session recordings, you must download the eCare Session Player, a Java application.

Download Player

Ticket Archive — Ticket ID : 1015

File Name	Description	Date Created	Time Created
Main.1015.2004-08-17-19-15-23.html	Transcript for Ticket 1015	2004-08-17	19:15:23
Main.1015.2004-08-17-18-52-32.0001.cob	Screen Sharing File	2004-08-17	19:14:19

To view a selected recording, you will save the session recording file to your computer. Then you can play the recording with the eCare Session Player.

To download the eCare Session Player

1. In the Ticket Archive window, click the *Download Player* link.
2. In the File Download dialog box, choose *Save*.
3. In the Save As dialog box, specify a file location and click *Save* again.

The eCare Session Player is saved as a single file called *Player.jar*.

To download the eCare session recording file

1. In the Ticket Archive window, click the link on the *Screen Sharing File* line.

   If multiple remote-control sessions take place during an eCare session, each remote-control session is recorded individually. If this occurs, multiple *Screen Sharing File* lines will appear.
2. In the File Download dialog box, choose *Save*.
3. In the Save As dialog box, specify a file location and click *Save* again.

The session recording is saved as a single file with a COB file extension.

To play the eCare session recording file

1. Double-click the *Player.jar* file to run it.

   The Netopia COB File Player opens.
2. Click *Browse* to select the saved session recording file.
3. When you have selected the file, click *Play* to begin playing the session recording file.

Generating and Using a Ticket Listing Export (XSLT) Report

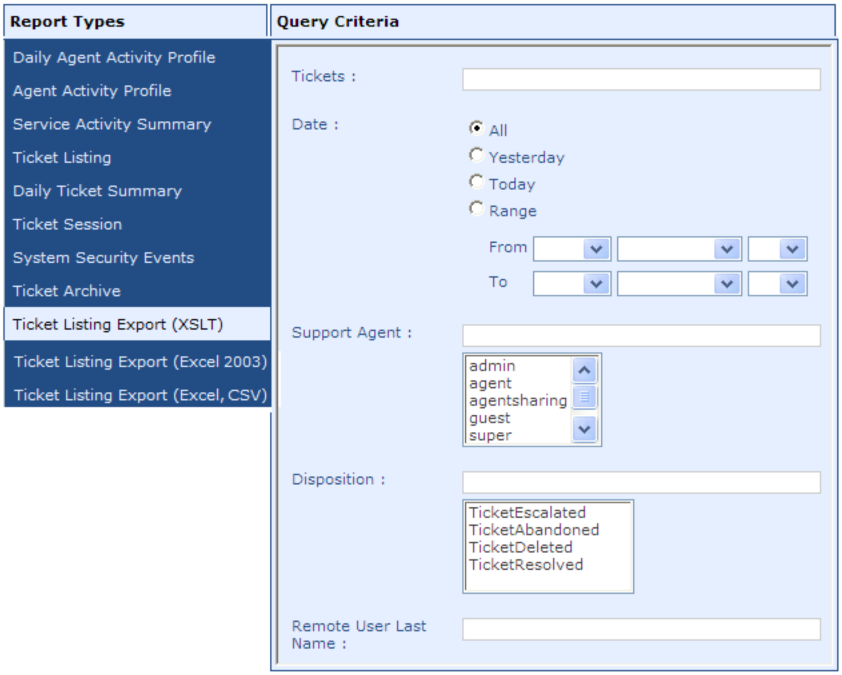
The Ticket Listing Export (XSLT) Report allows you to export an XML file that contains a summary of eCare sessions that match the criteria you specify.

The XML export file contains information similar to that provided by the Ticket Listing Report (see page 64).

For example, with this report you can export a custom set of data for third-party reporting and analysis.

To generate a Ticket Listing Export (XSLT) Report

1. Open the Ticket Listing Export (XSLT) query page by clicking the link on the main eCare Reporting page.



2. In the *Tickets* text box, enter the trouble ticket ID number associated with the eCare session you wish to retrieve.

   You may enter multiple ticket numbers, separated by commas.

3. In the *Date* area, choose a radio button to specify the day or time period you wish to search. If you choose the *Range* option, use the drop-down lists to specify a date range.

4. In the *Support Agent* list, double-click the user ID of the Support Agent or administrator for whom you wish to generate a report. (Note that the selection must appear in the *Support Agent* text box; if it is only highlighted in the

list, it will not be used.) *Guest* indicates all activity related to your eCare customers.

Separate multiple user IDs with commas. User IDs are case-sensitive. The *Support Agent* text box does not allow a partial-name or wildcard search.

If you do not specify a user ID in the *Support Agent* text box, the generated report will include activity for all users.

5. In the *Disposition* list, double-click the ticket disposition type for which you wish to generate the report. (Note that the selection must appear in the *Disposition* text box; if it is only highlighted in the list, it will not be used. See "Ticket Disposition Types" on page 67 for information about the available disposition types.)

   Separate multiple disposition types with commas. Disposition types are case-sensitive. The *Disposition* text box does not allow a partial-name or wildcard search.

   If you do not specify a disposition type in the *Disposition* text box, the generated report will include all tickets.

6. In the *Remote User Last Name* text box, enter the last name of the customer whose ticket you wish to retrieve.

   Separate multiple last names with commas. Last names are case-sensitive. The *Remote User Last Name* text box does not allow a partial-name or wildcard search.

7. Click *Generate Report* to generate the report.

   A File Download dialog box appears, allowing you to save the XML file.

8. Click *Save* to save the XML file to your computer.

   Be sure to click the *Save* button, rather than the *Open* button.

The output file includes a list of the eCare sessions that match your search criteria. If you enter no search criteria in the form, all eCare sessions will be retrieved.

The basic form of the XML output is as follows.

```
<row isGroupTotal="false" isReportTotal="false">
<field name="ticketmasterid">1</field>
<field name="ecareticketid">1001</field>
<field name="clientfirstname">Brent</field>
<field name="clientlastname">Henley</field>
<field name="clientemail">henley43@enforce.com</field>
<field name="clientphone">510-555-4343</field>
```

```
<field name="clientproblemdescription">I cannot
   download the archive.</field>
<field name="creationdate">2006-09-05</field>
<field name="creationtime">16:54:58</field>
<field name="ticketcategory1">Main</field>
<field name="ticketcategory2"/>
<field name="ticketpriority">10</field>
<field name="primaryagentid">jillian</field>
<field name="waittime">00:00:08</field>
<field name="servicingtime">00:02:06</field>
<field name="totaltickettime">126</field>
<field name="disposition">TicketResolved</field>
<field name="wasescalated">T</field>
<field name="wasaccepted">T</field>
```

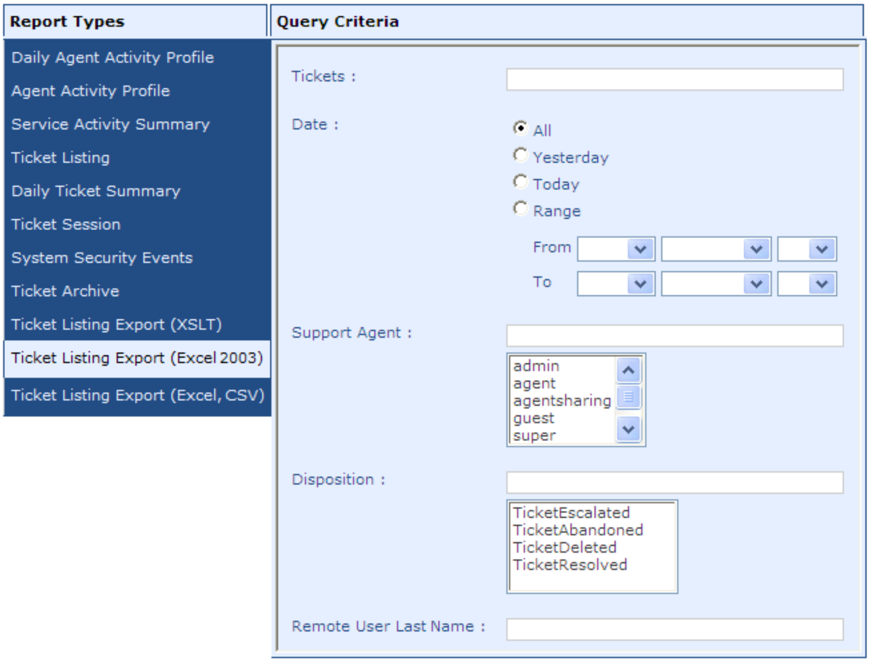
Generating and Using a Ticket Listing Export (Excel 2003) Report

The Ticket Listing Export (Excel 2003) Report allows you to export an XML file that contains a summary of eCare sessions that match the criteria you specify. This file can be loaded into Microsoft Excel 2003 and viewed as a spreadsheet. The export file contains information similar to that provided by the Ticket Listing Report (see page 64).

For example, with this report you can export data for custom spreadsheet-based reporting and analysis.

To generate a Ticket Listing Export (Excel 2003) Report

1. Open the Ticket Listing Export (Excel 2003) query page by clicking the link on the main eCare Reporting page.



2. In the *Tickets* text box, enter the trouble ticket ID number associated with the eCare session you wish to retrieve.

   You may enter multiple ticket numbers, separated by commas.

3. In the *Date* area, choose a radio button to specify the day or time period you wish to search. If you choose the *Range* option, use the drop-down lists to specify a date range.

4. In the *Support Agent* list, double-click the user ID of the Support Agent or administrator for whom you wish to generate a report. (Note that the selection must appear in the *Support Agent* text box; if it is only highlighted in the list, it will not be used.) *Guest* indicates all activity related to your eCare customers.

   Separate multiple user IDs with commas. User IDs are case-sensitive. The *Support Agent* text box does not allow a partial-name or wildcard search.

If you do not specify a user ID in the *Support Agent* text box, the generated report will include activity for all users.

5. In the *Disposition* list, double-click the ticket disposition type for which you wish to generate the report. (Note that the selection must appear in the *Disposition* text box; if it is only highlighted in the list, it will not be used. See "Ticket Disposition Types" on page 67 for information about the available disposition types.)

   Separate multiple disposition types with commas. Disposition types are case-sensitive. The *Disposition* text box does not allow a partial-name or wildcard search.

   If you do not specify a disposition type in the *Disposition* text box, the generated report will include all tickets.

6. In the *Remote User Last Name* text box, enter the last name of the customer whose ticket you wish to retrieve.

   Separate multiple last names with commas. Last names are case-sensitive. The *Remote User Last Name* text box does not allow a partial-name or wildcard search.

7. Click *Generate Report* to generate the report.

   A File Download dialog box appears, allowing you to save the exported file.

8. Click *Save* to save the file to your computer.

   Be sure to click the *Save* button, rather than the *Open* button.

The output report includes a list of eCare sessions that match your search criteria. If you enter no search criteria in the form, all eCare sessions will be retrieved.

To view the Ticket Listing Export (Excel 2003) report in Microsoft Excel 2003

1. Open Microsoft Excel 2003.
2. From the *File* menu, choose *Open*.
3. Locate and select the exported XML file.

   The file will open in Excel.

4. From the *File* menu, choose *Save As* to save the file with an XLS extension.

Note: The exported XML file is compatible with the XML import filter introduced in Microsoft Excel 2003. It will not open correctly in previous versions of Excel. (Once you have saved the file in XLS format, it can be opened with any version of

Excel.) If your application does not include a compatible import filter, use the Ticket Listing Export (Excel, CSV) report instead (see page 82).

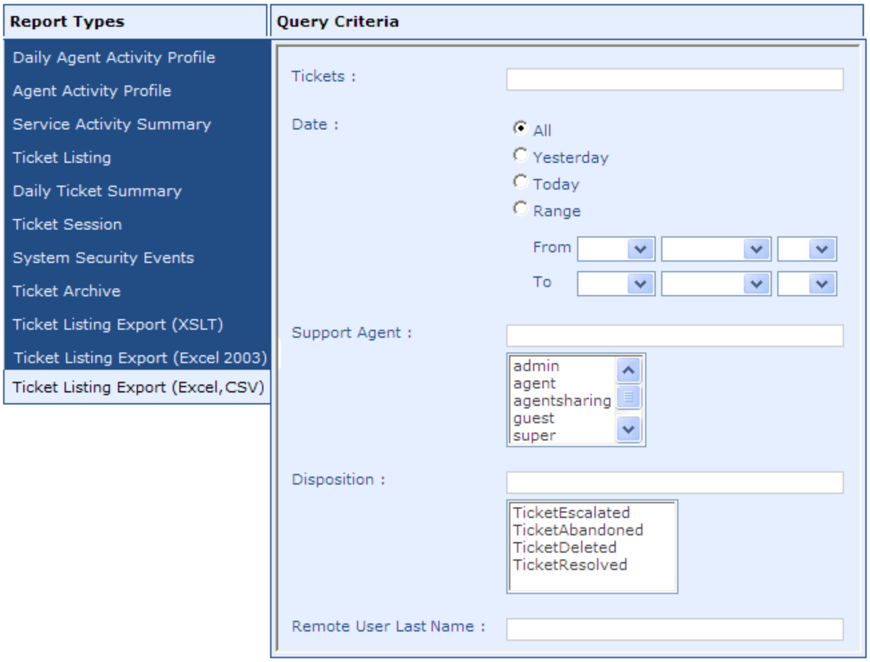
Generating and Using a Ticket Listing Export (Excel, CSV) Report

The Ticket Listing Export (Excel, CSV) Report allows you to export a CSV file that contains a summary of eCare sessions that match the criteria you specify. This file can be loaded into Microsoft Excel and viewed as a spreadsheet. The export file contains information similar to that provided by the Ticket Listing Report (see page 64).

For example, with this report you can export data for custom spreadsheet-based reporting and analysis.

To generate a Ticket Listing Export (Excel, CSV) Report

1. Open the Ticket Listing Export (Excel, CSV) query page by clicking the link on the main eCare Reporting page.



2. In the *Tickets* text box, enter the trouble ticket ID number associated with the eCare session you wish to retrieve.

   You may enter multiple ticket numbers, separated by commas.

3. In the *Date* area, choose a radio button to specify the day or time period you wish to search. If you choose the *Range* option, use the drop-down lists to specify a date range.

4. In the *Support Agent* list, double-click the user ID of the Support Agent or administrator for whom you wish to generate a report. (Note that the selection must appear in the *Support Agent* text box; if it is only highlighted in the list, it will not be used.) *Guest* indicates all activity related to your eCare customers.

   Separate multiple user IDs with commas. User IDs are case-sensitive. The *Support Agent* text box does not allow a partial-name or wildcard search.

If you do not specify a user ID in the *Support Agent* text box, the generated report will include activity for all users.

5. In the *Disposition* list, double-click the ticket disposition type for which you wish to generate the report. (Note that the selection must appear in the *Disposition* text box; if it is only highlighted in the list, it will not be used. See "Ticket Disposition Types" on page 67 for information about the available disposition types.)

   Separate multiple disposition types with commas. Disposition types are case-sensitive. The *Disposition* text box does not allow a partial-name or wildcard search.

   If you do not specify a disposition type in the *Disposition* text box, the generated report will include all tickets.

6. In the *Remote User Last Name* text box, enter the last name of the customer whose ticket you wish to retrieve.

   Separate multiple last names with commas. Last names are case-sensitive. The *Remote User Last Name* text box does not allow a partial-name or wildcard search.

7. Click *Generate Report* to generate the report.

   A File Download dialog box appears, allowing you to save the exported file.

8. Click *Save* to save the file to your computer.

   Be sure to click the *Save* button, rather than the *Open* button.

9. In the Save As dialog box, in the *File Name* text box, enter a name for the exported file. **Be sure to specify the CSV file extension.** (By default, Internet Explorer will save the file with an XML file extension. You do not need to change the file type.)

   If you do not specify the CSV file extension, you can rename the file after you download it. The exported file is not valid XML.

The output report includes a list of eCare sessions that match your search criteria. If you enter no search criteria in the form, all eCare sessions will be retrieved.

Note: To simply any post-processing you may wish to perform on your data, the exported file does not include column headings. If you view the default file as a simple spreadsheet, the columns are displayed in the following order.

```
ticket master id          ticket id
client first name         client last name
client email address      client phone number
```

```
client problem description ticket creation time
ticket creation date       ticket category1
ticket category2           ticket priority
servicing agent id         total ticket time
ticket wait time           ticket disposition
was ticket escalated       was ticket accepted
```

To view the Ticket Listing Export (Excel, CSV) report in Microsoft Excel

1. Open Microsoft Excel.
2. From the *File* menu, choose *Open*.
3. Locate and select the exported XML file.

   The file will open in Excel.
4. From the *File* menu, choose *Save As* to save the file with an XLS extension.

Note: The exported XML file will open correctly only in Microsoft Excel 2003, and not in previous versions of Excel. However, once you have saved the file in XLS format, it can be opened with any version of Excel.

Appendix B: eCare Color Mapping

You can completely customize and "brand" the look and feel of your eCare service to make it consistent with your corporate identity. The *Appearance* settings in the eCare Preferences Manager allow you to change the color scheme of both the customer and Support Agent portals and upload custom images to replace the default ones used by your eCare service.

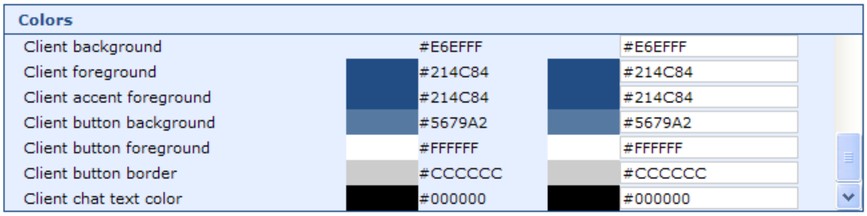
The *Colors* area on the *Appearance* page allows you to specify the color of a number of eCare elements.

For information about setting custom colors, see "Setting Custom Colors" on page 34.

The rest of this appendix lists the interface elements that are used by each of the eCare windows and screens.

eCare Customer Portal Color Mappings

You can set a custom color for each of the eCare customer portal interface elements shown in the image below.



For example, on this eCare service the *Client background* color is set to #E6EFFF and the *Client button border* is set to #CCCCCC.

eCare Initialization screen

The eCare initialization screen, which appears when the customer opens the main eCare URL, uses the following interface elements.

- Client background
- Client foreground
- Client accent foreground

eCare Ticket Submission Screen

The eCare ticket submission screen, on which the customer will fill out the trouble-ticket form, uses the following interface elements.

- Client background
- Client foreground
- Client button background
- Client button foreground
- Client button border

eCare Waiting Screen

The eCare waiting screen, which advises the customer of their place in the trouble-ticket queue, uses the following interface elements.

- Client background
- Client accent foreground
- Client foreground
- Client button background
- Client button foreground
- Client button border

eCare Customer Session Window

The eCare customer session window, in which the customer will communicate with an eCare Support Agent, uses the following interface elements.

- Client background
- Client button background
- Client button foreground
- Client button border
- Client chat text color

eCare Session End Screen

The eCare session end screen, which appears when the eCare session is complete, uses the following interface elements.

- Client background
- Client foreground
- Client accent foreground

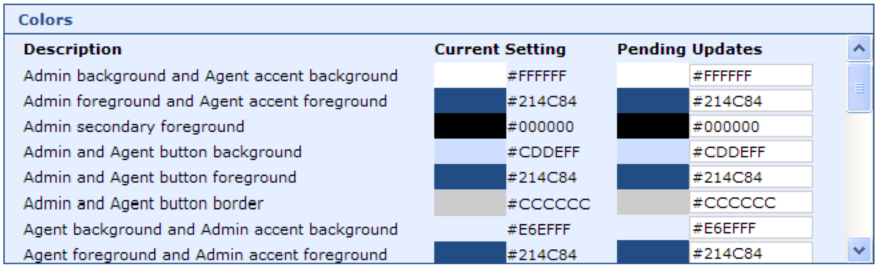
eCare Customer Surveys

The eCare customer surveys, which may appear if your eCare Service Center is configured to use these surveys, use the following interface elements.

- Client background
- Client accent foreground
- Client button background
- Client button foreground
- Client button border

eCare Administrator Portal Color Mappings

You can set a custom color for each of the eCare Administrator portal elements shown in the image below.


Colors

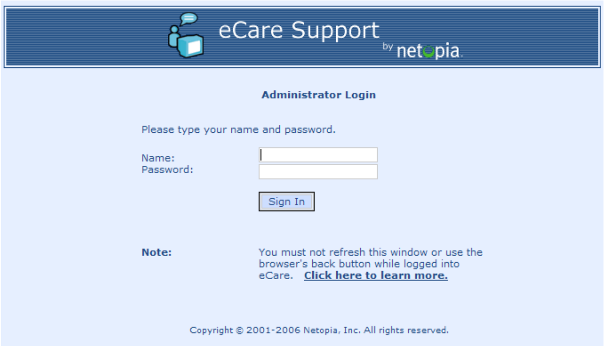
Description	Current Setting	Pending Updates
Admin background and Agent accent background	#FFFFFF	#FFFFFF
Admin foreground and Agent accent foreground	#214C84	#214C84
Admin secondary foreground	#000000	#000000
Admin and Agent button background	#CDDEFF	#CDDEFF
Admin and Agent button foreground	#214C84	#214C84
Admin and Agent button border	#CCCCCC	#CCCCCC
Agent background and Admin accent background	#E6EFFF	#E6EFFF
Agent foreground and Admin accent foreground	#214C84	#214C84

For example, on this eCare service the *Admin background and Agent accent background* color is set to #FFFFFF and the *Admin and Agent button border* is set to #CCCCCC.

eCare Administrator Login Screen

The eCare administrator login screen, on which the eCare administrator enters access credentials, uses the following interface elements.

- Agent Background and Admin accent background
- Admin foreground and Agent accent foreground
- Agent foreground and Admin accent foreground
- Admin and Agent button background
- Admin and Agent button foreground



eCare Initialization Screen

The eCare initialization screen, which appears after the administrator signs in to eCare, uses the following interface elements.

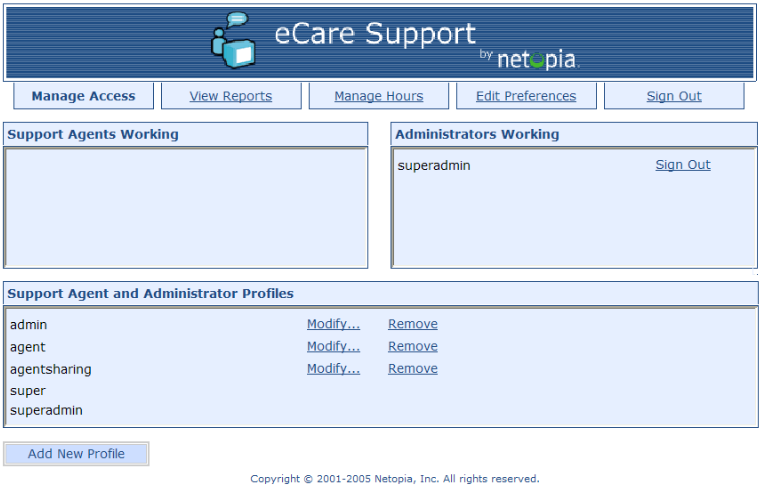
- Client background
- Client foreground
- Client accent foreground

Note that these colors are set with the eCare customer portal settings (see "eCare Customer Portal Color Mappings" on page 86).

eCare Administrator Portal Screens

The eCare Administrator portal, with which the eCare administrator can manage the eCare Service Center, uses the following interface elements. (All Administrator portal screens use the same colors.)

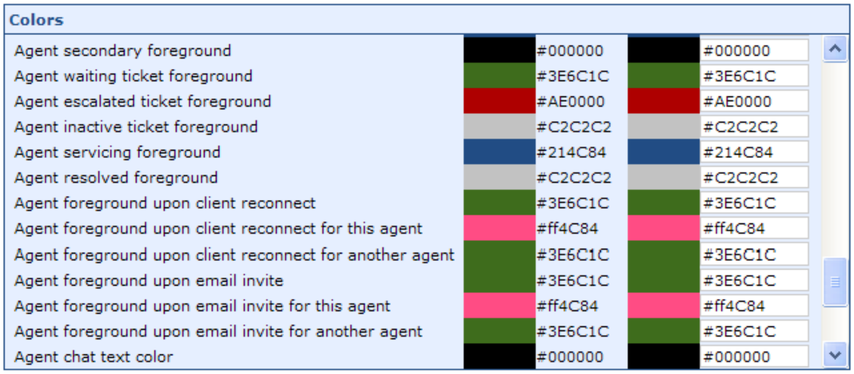
- Admin background and Agent accent background
- Agent background and Admin accent background
- Agent foreground and Admin accent foreground
- Admin and Agent button background
- Admin and Agent button foreground



eCare Support Agent Portal Color Mappings

You can set a custom color for each of the eCare Support Agent portal elements shown in the image below.

Note: Other colors are set with the eCare Administrator portal options. See "eCare Administrator Portal Color Mappings" on page 90.



For example, on this eCare service the *Agent secondary foreground* color is set to `#000000` and the *Agent escalated ticket foreground* is set to `#AE0000`.

eCare Support Agent Login Screen

The eCare Support Agent login screen, on which the eCare Support Agent enters access credentials, uses the following interface elements.

- Agent Background and Admin accent background
- Admin foreground and Agent accent foreground
- Agent foreground and Admin accent foreground
- Admin and Agent button background
- Admin and Agent button foreground

Note that these colors are set with the eCare administrator portal settings (see "eCare Administrator Portal Color Mappings" on page 90).

eCare Initialization Screen

The eCare initialization screen, which appears after the Support Agent signs in to eCare, uses the following interface elements.

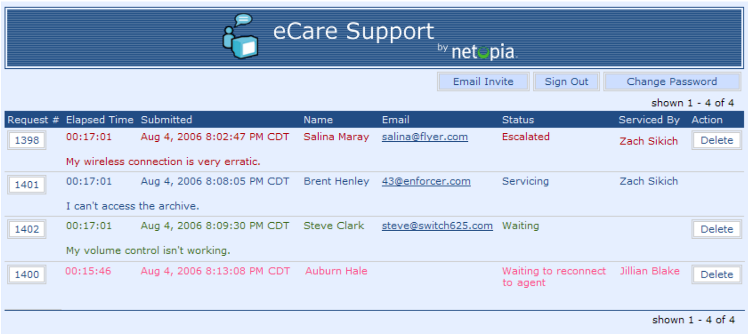
- Client background
- Client foreground
- Client accent foreground

Note that these colors are set with the eCare customer portal settings (see "eCare Customer Portal Color Mappings" on page 86).

eCare Trouble-Ticket Queue

The eCare trouble-ticket queue, which displays active, escalated, and resolved trouble tickets, uses the following interface elements.

- Admin background and Agent accent background
- Admin foreground and Agent accent foreground
- Admin and Agent button background
- Admin and Agent button foreground
- Agent background and Admin accent background
- Agent foreground and Admin accent foreground
- Agent waiting ticket foreground (if a new ticket is present)
- Agent escalated ticket foreground (if an escalated ticket is present)
- Agent inactive ticket foreground (if a resolved ticket is present)
- Agent foreground upon client reconnect
- Agent foreground upon client reconnect for this agent
- Agent foreground upon client reconnect for another agent
- Agent foreground upon email invite
- Agent foreground upon email invite for this agent
- Agent foreground upon email invite for another agent



eCare Support Agent Session Window

The eCare Support Agent session window, in which the Support Agent will communicate with the customer to resolve the trouble ticket, uses the following interface elements.

- Admin background and Agent accent background
- Admin foreground and Agent accent foreground
- Admin and Agent button background
- Admin and Agent button foreground

- Agent background and Admin accent background
- Agent foreground and Admin accent foreground

eCare Support Agent Surveys

The eCare Support Agent surveys, which may appear if your eCare Service Center is configured to use these surveys, use the following interface elements.

- Admin foreground and Agent accent foreground
- Admin and Agent button background
- Admin and Agent button foreground
- Agent background and Admin accent background
- Agent foreground and Admin accent foreground


eCare Support
by netopia
Agent Logout Survey
Please take a few minutes and answer these questions.
1. Reason for leaving?
Break
End of shift
Meeting
2. Hardest Problem Encountered?
3. Most common problem encounterd
4. Suggestions
Submit
Cancel

Appendix C: Installing the eCare Remote-Control Component

Before your Support Agents can use eCare's screen-sharing services, they will need to install the *eCare remote-control component*, which is a control that enables the computer to use these services. Windows computers use the eCare ActiveX control, while Macintosh computers use the eCare plugin.

In eCare version 4, you can pre-install the Netopia eCare remote-control component on the computers on your network. By default, eCare downloads the eCare remote-control component the first time a Support Agent accesses your eCare Service Center and anytime the eCare remote-control component is upgraded. However, your organization may have implemented policies or security measures that prevent users from downloading or installing ActiveX controls or plugins. Your IT organization will be able to bypass these security measures to install the eCare remote-control component.

To install the eCare ActiveX control on Windows computers, you must have Windows Administrator privileges. Therefore, you may also need to deploy the eCare ActiveX control to those computers whose regular users do not have permission to download or install it.

Note: The eCare system also uses the eCare reconnect component to allow customers to reconnect to eCare automatically after the Support Agent reboots their computer or after a session interruption. If your organization's policies allow the Support Agent to download the eCare remote-control component automatically, the eCare reconnect component will be downloaded at the same time. However, the reconnect component is not used by the Support Agent's computer. If you must pre-install the remote-control component, you will not need to install the reconnect component.

Pre-Installing the eCare ActiveX Control on Windows Computers

You may pre-install the eCare ActiveX control on both local and remote Windows computers.

Pre-Installing the eCare ActiveX Control on a Remote Windows Computer

Before you can install the eCare ActiveX control on a remote computer, you must download a local copy. To do so, use the following procedure.

To download the eCare ActiveX control

1. In a text file, enter the following lines.

   ```
   <html>
   <a href="http://<server>/<service>/ecare4/components/
      CobAgent_4.0_w98.cab">eCare ActiveX for Windows 98</a>
   <a href="http://<server>/<service>/ecare4/components/
      CobAgent_4.2.1.314.cab">eCare ActiveX</a>
   </html>
   ```

   In place of <*server*> and <*service*>, enter the location of your eCare service. For example,

   ```
   <a href="http://ecare.netopia.com/247service/ecare4/
      components/CobAgent_4.2.1.314.cab">eCare ActiveX</a>
   ```
2. Save this file as an HTML file (for example, *activex.html*).
3. Open the file in Internet Explorer.
4. Right-click each link and choose *Save Target As* to save the ActiveX file to your computer.

   Note: Internet Explorer may attempt to save the ActiveX file as an HTM file. Be sure to specify the correct CAB file extension and the *All Files* file type before you save the file.

Now you are ready to deploy the eCare ActiveX control to the computers on your network.

To deploy the eCare ActiveX control to remote computers

1. Download the CAB file for the eCare ActiveX control by following the above procedure.
2. Using a file-extraction utility, open the CAB file and extract the files that comprise the eCare remote-control component: *CobAgent4.dll* and *CobAgent4.inf* for Windows 98, and *CobAgent4_2_1_314.dll* and*CobAgent4_2_1_314.inf* for Windows XP.
3. Using the software deployment tool of your choice, distribute the appropriate files (**not** the directories) to the target computers.
   - Use the *CobAgent* files for Windows 2000 and Windows XP computers.
   - Use the *CobAgent98* files for Windows 98 and Windows ME computers.

   Place the files in the *\WINNT\Downloaded Program Files* or *\WINDOWS\Downloaded Programs Files* folder on the target computers.

   Note that you cannot copy files to the Downloaded Program Files folder using Windows Explorer. You must copy them at the command line with the copy command.
4. On the command line, enter the following command to register the eCare ActiveX control with Windows.

   ```
   regsvr32 /s C:\WINDOWS\Downloaded Program Files\
      CobAgent4_2_1_314.dll
   ```

   For Windows 98, use

   ```
   regsvr32 /s C:\WINDOWS\Downloaded Program Files\
      CobAgent4.dll
   ```

The ActiveX control is now installed and registered for use with Windows. (Note that it will *not* appear in the Downloaded Program Files folder in Windows Explorer.)

If you need to unregister the ActiveX control, run the following command.

```
regsvr32 /s /u C:\WINDOWS\Downloaded Program Files\
   CobAgent4_2_1_314.dll
```

For Windows 98, use

```
regsvr32 /s /u C:\WINDOWS\Downloaded Program Files\
   CobAgent4.dll
```

Pre-Installing the eCare ActiveX Control on the Local Windows Computer

On the Support Agent's computer, open Internet Explorer and make sure the following options are set.

- JavaScript and ActiveX enabled
- Java enabled, if the Support Agent will have eCare administrator privileges (Java is required to play session recordings, which are accessible only to administrators)
- Medium security or lower
- Cookies must be allowed

In addition, *all* pop-up blocking software *must be turned off* before the Support Agent can use eCare. This includes the pop-up blockers that are built in to Internet Explorer, as well as third-party blocking software for all platforms.

Then, load the URL for the Support Agent portal. Sign in to eCare with your administrator user name and password. (Your eCare administrator credentials allow you to sign in to both the Support Agent and Administrator portals. However, the Administrator portal does not require the eCare remote-control component.)

To install the ActiveX control

Once you have signed in, the eCare system will automatically detect the missing or outdated eCare ActiveX control and prompt you to install the newer version. (Macintosh users will be prompted to download the eCare plugin as described below.)

1. Click the *Accept* button.
2. In the next dialog box, which asks you to confirm your intention to install the remote-control component, click *Yes*.
3. On Windows XP computers, an additional window appears: Installing Browser Add-On.

   Click the yellow ActiveX warning bar and select *Install ActiveX Control* to begin installing the eCare remote-control component. When a window appears asking if you want to install the software, click *Install*.

The ActiveX control will download and install automatically. The ActiveX control is named *CobAgent4 Class*. It will be installed in the *WINNT/Downloaded Program Files* or *WINDOWS/Downloaded Program Files* folder.

Pre-Installing the eCare Remote-Control Component on Macintosh Computers

You may pre-install the eCare plugin control on both local and remote Macintosh computers.

Pre-Installing the eCare Plugin on a Remote Macintosh Computer

Before you can install the eCare plugin control on a remote computer, you must download a local copy. To do so, use the following procedure.

To download the eCare plugin

- Open Safari and enter the following URL.

  http://‹server›/‹service›/ecare4/components/Netopia RC Installer.dmg

  The plugin disk image will download.

To deploy the eCare plugin to remote computers

1. Download the DMG file for the Netopia RC Installer by following the above procedure.
2. Using the software deployment tool of your choice, distribute the file to the target computers.
3. Execute the installer.

Pre-Installing the eCare Plugin on the Local Macintosh Computer

On the Support Agent's computer, open Safari and make sure the following options are set.

- Plug-ins and JavaScript enabled
- Cookies must be allowed

In addition, *all* pop-up blocking software *must be turned off* before the Support Agent can use eCare. This includes the pop-up blockers that are built in to Safari, as well as third-party blocking software for all platforms.

Then, load the URL for the Support Agent portal. Sign in to eCare with your administrator user name and password. (Your eCare administrator credentials allow you to sign in to both the Support Agent and Administrator portals. However, the Administrator portal does not require the eCare remote-control component.)

To download and install the eCare plugin

Once you have signed in to eCare, the eCare system will automatically detect the missing or outdated eCare plugin and prompt you to install the newer version. (Windows users will be prompted to download the eCare ActiveX control as described above.)

1. Click the *Accept* button.

   The eCare plugin is downloaded as a disk image and opened automatically.
2. To install the plugin, double-click the *Netopia RC Installer* file.
3. A dialog box appears, indicating that the browser plug-in will be installed. Click *Yes*.

Installation then proceeds automatically. When installation is complete, you will be notified. Quit and restart Safari for the make the eCare plugin available for use.

The eCare plugin is named *Netopia RC Plugin*. It is located in the *Library/Internet Plug-ins* folder in the current user's home folder.

Remote-Control Component Installation for Customers

By default, the eCare remote-control component is installed when the customer loads the eCare URL for the first time. This maximizes the efficiency of your Support Agents by avoiding delays during active eCare sessions. However, eCare can also be configured to download the eCare remote-control component only when the Support Agent needs to use a remote-control service.

This "serve on demand" option may be desirable if your organization commonly serves customers that most often require only chat, Push URL, or file-transfer services. This choice optimizes the customer experience.

Appendix D: Netopia Contacts

Netopia Customer Service

http://www.netopia.com/support/ecaresupport.html

Customer Support is available Monday–Friday from 6AM–5:30PM Pacific time.

6001 Shellmound Street, 4th Floor
Emeryville, CA 94608 USA

North America Software Sales

14285 Midway Road
Suite 350
Addison, TX 75001 USA

(800) 485-5741

Europe Software Sales

Becanusstraat 13-15, bus5
6216 BX
Maastricht Netherlands

+31 (0) 43 354 5020